



Financial & Estate Literacy - 24033 El Toro Road, Suite 130, Laguna Hills, CA 92653

IT'S YOUR MONEY! AND IT'S YOUR ESTATE!

Fall 2018 Workshop Series

Workshop community	Moderators	Contact
Orange County	Peter Kote Trevor Murphy Richard Huntington	Pete@ItsYourMoneyAndEstate.org Trevor@ItsYourMoneyAndEstate.org huntingtonjr@msn.com

It's Your Money	WEEK	It's Your Estate
Introduction and New Tax Law	1	Introduction and New Tax Law
Annuities and Mutual Funds	2	Estate Planning Basics
Financial Planning I	3	Planning for Incapacity
Financial Planning II	4	Living Trusts
Medical Care Planning	5	Tax Planning Issues
Equity Investing	6	Retirement Account Planning
Fixed Income Investing	7	The Trustee and Executor
The Big Takeaway	8	Case Study and Review

Charitable Sponsors: The American Heart Association, Chapman University, CHOC Children's Foundation, Financial & Estate Literacy, In Defense of Animals, Laguna Canyon Foundation, Mission Hospital Foundation, Orange Coast College Foundation, St. Jude Memorial Foundation, Susan G. Komen® Orange County and Orange County United Way.

City	Workshop	Venue	Day and Time
Newport Beach 949-548-2411	"It's Your Money!"	<u>Newport Beach Central Library</u> 1000 Avocado Street	Mondays, September 10 – October 29 10:00 AM to 11:30 AM
09-10-18	Introduction and New Tax Law		
09-17-18	Annuities & Mutual Funds		
09-24-18	Financial Planning I		
10-01-18	Financial Planning II		
10-08-18	Medical Care Planning		
10-15-18	Equity Investing		
10-22-18	Fixed Income Investing		
10-29-18	The Big Take Away & Contest		
Orange 714-288-2470	"It's Your Estate!"	<u>Orange Public Library</u> 407 East Chapman Avenue	Tuesdays, September 11 – October 31 9:30 AM to 11:00 AM
09-11-18	Introduction and New Tax Law		
09-18-18	Estate Planning Basics		
09-25-18	Planning for Incapacity		
10-02-18	Living Trust		
10-09-18	Charitable Income & Tax Planning Issues		
10-16-18	Retirement Account Planning		
10-23-18	The Role of a Trustee & Executor		
10-30-18	Case Study/Review		

Laguna Niguel 949-425-5151	"It's Your Estate!"	<u>Sea Country Center</u> 24602 Aliso Creek Road	Tuesdays, September 4 – October 23 1:00 PM to 2:30 PM
09-04-18		Introduction and New Tax Law	
09-11-18		Estate Planning Basics	
09-18-18		Planning for Incapacity	
09-25-18		Living Trust & More	
10-02-18		Charitable Income & Tax Planning Issues	
10-09-18		Retirement Account Planning	
10-16-18		The Role of a Trustee & Executor	
10-23-18		Case Study/Review	
Brea 714-990-7751	"It's Your Estate!"	<u>Brea Senior Center</u> 500 Sievers Avenue	Tuesdays, September 4 – October 23 1:30 PM to 3:00 PM
09-04-18		Introduction and New Tax Law	
09-11-18		Estate Planning Basics	
09-18-18		Planning for Incapacity	
09-25-18		Living Trust & More	
10-02-18		Charitable Income & Tax Planning Issues	
10-09-18		Retirement Account Planning	
10-16-18		The Role of a Trustee & Executor	
10-23-18		Case Study/Review	
La Habra 562-383-4200	"It's Your Estate!"	<u>La Habra Community Center</u> 101 W. La Habra Blvd	Tuesdays, September 4 – October 23 2:00 PM to 3:30 PM
09-04-18		Introduction and New Tax Law	
09-11-18		Estate Planning Basics	
09-18-18		Planning for Incapacity	
09-25-18		Living Trust & More	
10-02-18		Charitable Income & Tax Planning Issues	
10-09-18		Retirement Account Planning	
10-16-18		The Role of a Trustee & Executor	
10-23-18		Case Study/Review	
Irvine 949-724-7300	"It's Your Money!"	<u>Lakeview Senior Center</u> 20 Lake Road	Wednesdays, September 12 – October 31 1:00 PM to 2:30 PM
09-12-18		Introduction and New Tax Law	
09-19-18		Annuities & Mutual Funds	
09-26-18		Financial Planning I	
10-03-18		Financial Planning II	
10-10-18		Medical Care Planning	
10-17-18		Equity Investing	
10-24-18		Fixed Income Investing	
10-31-18		The Big Take Away & Contest	
Huntington Beach 714-536-5600	"It's Your Money!"	<u>Senior Center in Central Park</u> 18041 Goldenwest St	Wednesdays, September 5 – October 24 2:00 PM to 3:30 PM
09-05-18		Introduction and New Tax Law	
09-12-18		Annuities & Mutual Funds	
09-19-18		Financial Planning I	
09-26-18		Financial Planning II	
10-03-18		Medical Care Planning	
10-10-18		Equity Investing	
10-17-18		Fixed Income Investing	
10-24-18		The Big Take Away & Contest	

Email

Trevor@ItsYourMoneyAndEstate.org

Web

www.ItsYourMoneyAndEstate.org

Fullerton 714-738-6305	"It's Your Money!" <u>Fullerton Community Center</u> 340 W Commonwealth Avenue Grand Hall A/B	Wednesdays, September 5 – October 24 2:00 PM to 3:30 PM
09-05-18 09-12-18 09-19-18 09-26-18 10-03-18 10-10-18 10-17-18 10-24-18	Introduction and New Tax Law Annuities & Mutual Funds Financial Planning I Financial Planning II Medical Care Planning Equity Investing Fixed Income Investing The Big Take Away & Contest	
Mission Viejo 949-470-3062	"It's Your Money!" <u>Norman P. Murray Senior Center</u> 24932 Veterans Way	Thursdays, September 6 – October 25 10:00 AM to 11:30 AM
09-06-18 09-13-18 09-20-18 09-27-18 10-04-18 10-11-18 10-18-18 10-25-18	Introduction and New Tax Law Annuities & Mutual Funds Financial Planning I Financial Planning II Medical Care Planning Equity Investing Fixed Income Investing The Big Take Away & Contest	
Costa Mesa 714-432-5707	"It's Your Money!" <u>Orange Coast College</u> 2701 Fairview Road Ronnenberg Sustainability Education Center Classroom 101 Adams Parking Lot	Fridays, September 28 – November 16 10:00 AM to 11:30 AM
09-28-18 10-05-18 10-12-18 10-19-18 10-26-18 10-02-18 11-09-18 11-16-18	Introduction and New Tax Law Annuities & Mutual Funds Financial Planning I Financial Planning II Medical Care Planning Equity Investing Fixed Income Investing The Big Take Away & Contest	
Laguna Beach 949-715-8105 Reservations Requested	"It's Your Estate!" <u>Laguna Beach Senior Center</u> 380 Third Street	Fridays, September 7 – October 26 1:30 PM to 3:00 PM
09-07-18 09-14-18 09-21-18 09-28-18 10-05-18 10-12-18 10-19-18 10-26-18	Introduction and New Tax Law Estate Planning Basics Planning for Incapacity Living Trust & More Charitable Income & Tax Planning Issues Retirement Account Planning The Role of a Trustee & Executor Case Study/Review	

About our Workshops

No commercial or for-profit sponsors; No speaker will receive attendees' name, address or phone number; No financial or insurance product will be sold; No charity will solicit you for a donation.

It's Your Money

The "It's Your Money!" sessions cover the business of money; 12 hours of objective education over an 8 week period. Our instructors are local FEE ONLY financial advisors who all act in a fiduciary capacity with their clients. None of our speakers are licensed to sell any financial products. You will learn how they charge and the steps you need to take on your financial plan with or without a professional.

It's Your Estate

The "It's Your Estate!" sessions cover all the legal documents you will need to set up an estate plan using a variety of local Orange County estate planning attorneys as instructors. We provide 12 hours of objective education over an 8 week period, 1 ½ hours per week. Each attorney explains their fees in detail and they do not receive your contact information.

ITSYOURMONEYANDESTATE.ORG

Mission

To prevent financial abuse by educating seniors to take control of their financial, estate, and charitable giving decisions.

Purpose

*We are a not-for-profit community resource, filled with financial and estate planning education that, at all times, will focus on what is **in your best interest**. We encourage tax-wise charitable giving that reflect your core values.*

Origin

Peter Kote, founder of the workshop series and former planned giving director, started with a simple idea 20 plus years ago: if people knew more about money and estate planning, a greater percentage of individuals would be willing to make a planned gift.

After teaching the program to faculty members at Long Beach State University, Peter recognized the overwhelming need for unbiased financial planning education. Since its fruition, the workshops have grown in size and popularity. Peter won the Financial Planning Association's "Heart of Financial Planning Distinguished Service Award" for the Orange County workshops. As of October 2012 the workshop series has officially incorporated as a nonprofit.

For more information, please contact Trevor Murphy, President & CEO of Financial & Estate Literacy or ItsYourMoneyAndEstate.org

Email: Trevor@ItsYourMoneyAndEstate.org or telephone (949) 463-1507