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!"	Newport Beach Central Library 1000 Avocado Street	Mondays, September 10 - October 29 10:00 AM to 11:30 AM
09-10-18	Introduction and New Tax Law		Peter Kote/Mark Prendergast/Mark Rutter
09-17-18	Sales Game; An Insider Tale		Wes Long
09-24-18	Financial Planning I		Laura Tarbox
10-01-18	Financial Planning II		Laura Tarbox
10-08-18	Medical Care Planning		Peter Kote/Lee-Anne Godfrey
10-15-18	Equity Investing		Mark Hebner
10-22-18	Fixed Income Investing		Scott Anderson & Julianna Bray
10-29-18	The Big Take Away & Contest		Neal Rutter/Patrick Stark/Mark Rylance John Prichard
Orange 714-288-2470	"It's Your Estate!"	Orange Public Library 407 East Chapman Avenue	Tuesdays, September 11 – October 31 9:30 AM to 11:00 AM
09-11-18	Introduction and New Tax Law		Peter Kote & Gina Chironis
09-18-18	Estate Planning Basics		Timothy Gray
09-25-18	Planning for Incapacity		Dennis Jensen
10-02-18	Living Trust		Nicole Newman
10-09-18	Charitable Income & Tax Planning Issue		David Moore
10-16-18	Retirement Account Planning		Michael Simon
10-23-18	The Role of a Trustee & Executor		Peter Kote
10-30-18	Case Study/Review		Steve Bemis

Laguna Niguel 949-425-5151	"It's Your Estate!"	Sea Country Center 24602 Aliso Creek Road	Tuesdays, September 4 – October 23 1:00 PM to 2:30 PM
09-04-18	Introduction and New Tax Law		Marty McNamara/Richard Huntington
09-11-18	Estate Planning Basics		Stephanie Winsted
09-18-18	Planning for Incapacity		Eric Becker
09-25-18	Living Trust & More		Steve Giammichele
10-02-18	Charitable Income & Tax Planning Issues		Lindsey Jacobs
10-09-18	Retirement Account Planning		Fred Musarella
10-16-18	The Role of a Trustee & Executor		Brian Bissell and Richard Huntington
10-23-18	Case Study/Review		Timothy Prichard/Richard Huntington
Brea 714-990-7751	"It's Your Estate!"	Brea Senior Center 500 Sievers Avenue	Tuesdays, September 4 – October 23 1:30 PM to 3:00 PM
09-04-18	Introduction and New Tax Law		Trevor Murphy & Robert McDaniel
09-11-18	Estate Planning Basics		Nicole Newman
09-18-18	Planning for Incapacity		Edward Pallotta, Jr.
09-25-18	Living Trust & More		Davinda Wijemanne
10-02-18	Charitable Income & Tax Planning Issues		Tony Truong
10-09-18	Retirement Account Planning		Michael Simon
10-16-18	The Role of a Trustee & Executor		Shelly O'Byrne/Trevor Murphy
10-23-18	Case Study/Review		Marc Eagan/Trevor Murphy
La Habra 562-383-4200	"It's Your Estate!"	La Habra Community Center 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		Carl Lachman/Michael Giangrande
09-11-18	Estate Planning Basics		Barbara Dibble
09-18-18	Planning for Incapacity		Dan York
09-25-18	Living Trust & More		Shauna Anderson
10-02-18	Charitable Income & Tax Planning Issues		David Moore
10-09-18	Retirement Account Planning		Travis McShane
10-16-18	The Role of a Trustee & Executor		Sophia Sakamoto/Stephanie
10-23-18	Case Study/Review		Carl Lachman
Irvine 949-724-7300	"It's Your Money!"	Lakeview Senior Center 20 Lake Road	Wednesdays, September 12 – October 31 1:00 PM to 2:30 PM
09-12-18	Introduction and New Tax Law		Trevor Murphy/Mark Prendergast
09-19-18	Sales Game; An Insider Tale		Wes Long
09-26-18	Financial Planning I		Marty McNamara
10-03-18	Financial Planning II		Patrick Chu
10-10-18	Medical Care Planning		Lee-Anne Godfrey
10-17-18	Equity Investing		Matthew Pixa
10-24-18	Fixed Income Investing		William Cuthbertson
10-31-18	The Big Take Away & Contest		Meghan Coolbaugh
Huntington Beach 714-536-5600	"It's Your Money!"	Senior Center in Central Park 18041 Goldenwest St	Wednesdays, September 5 – October 24 2:00 PM to 3:30 PM
09-05-18	Introduction and New Tax Law		Peter Kote & Mark Prendergast
09-12-18	Annuities & Mutual Funds		Peter Kote & Neal Rutter
09-19-18	Financial Planning I		Delia Fernandez
09-26-18	Financial Planning II		Delia Fernandez
10-03-18	Medical Care Planning		Peter Kote
10-10-18	Equity Investing		Mark Prendergast
10-17-18	Fixed Income Investing		Julie Bray
10-24-18	The Big Take Away & Contest		Patrick Stark & Neal Rutter

Fullerton 714-738-6305	"It's Your Money!"	Fullerton Community Center 340 W Commonwealth Avenue Grand Hall A/B	Wednesdays, September 5 - October 24 2:00 PM to 3:30 PM
09-05-18	Introduction and New Tax Law		Carl Lachman/Michael Giangrande
09-12-18	Annuities & Mutual Funds		Robert McDaniel
09-19-18	Financial Planning I		David MacLeod
09-26-18	Financial Planning II		David MacLeod
10-03-18	Medical Care Planning		Kari Buist-Baker
10-10-18	Equity Investing		Julie Bray
10-17-18	Fixed Income Investing		Mark Wilson
10-24-18	Money & Your Mind/Stock Market Contest Results		Carl Lachman
Mission Viejo 949-470-3062	"It's Your Money!"	Norman P. Murray Senior Center 24932 Veterans Way	Thursdays, September 6 – October 25 10:00 AM to 11:30 AM
09-06-18	Introduction and New Tax Law		Richard Huntington/Marty McNamara
09-13-18	Annuities & Mutual Funds		Neal Rutter/Richard Huntington
09-20-18	Financial Planning I		Ashley Bleckner
09-27-18	Financial Planning II		Ashley Bleckner
10-04-18	Medical Care Planning		Kari Buist Baker
10-11-18	Equity Investing		Wade Slome
10-18-18	Fixed Income Investing		Mark Wilson
10-25-18	The Big Take Away & Contest		Megan Coolbaugh/Neal Rutter
Costa Mesa 714-432-5707	"It's Your Money!"	Orange Coast College 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	Introduction and New Tax Law		Trevor Murphy/Marty McNamara
10-05-18	Sales Game; An Insider Tale		Wes Long
10-12-18	Financial Planning I		Laurie Dubchansky
10-19-18	Financial Planning II		Gina Chironis
10-26-18	Medical Care Planning		Christina Palmer
11-02-18	Equity Investing		Randall Allen
11-09-18	Fixed Income Investing		Kurt Beimfohr
11-16-18	The Big Take Away & Contest		Carl Lachman
Laguna Beach 949-715-8105 Reservations Requested	"It's Your Estate!"	Laguna Beach Senior Center 380 Third Street	Fridays, September 7 – October 26 1:30 PM to 3:00 PM
09-07-18	Introduction and New Tax Law		Peter Kote & Gina Chironis
09-14-18	Estate Planning Basics		Peter McMahon
09-21-18	Planning for Incapacity		Timothy Gray
09-28-18	Living Trust & More		Leslie Daff
10-05-18	Charitable Income & Tax Planning Issues		David Moore
10-12-18	Retirement Account Planning		Michael Simon
10-19-18	The Role of a Trustee & Executor		Nicole Anderson
10-26-18	Case Study/Review		Mark Powell

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 contract Trevor Murphy, President & CEO of Financial & Estate Literacy or ItsYourMoneyAndEstate.org

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