

# Finance & Estate Literacy

## It's Your Money and It's Your Estate Spring 2021 Virtual Seminars

For many years, we have offered these two series in person throughout Orange County. Given the current Covid-19 situation, in-person sessions are not an option. We hope that things turn around for the better soon so we can resume in-person sessions by Fall 2021.

Given the success of the Fall virtual series and based on the positive feedback of participants, it was decided that both It's Your Money and It's Your Estate will each be offered through Zoom Webinar seminars for Spring 2021. As always, there is no cost to attend these sessions. You can choose to register for one or both series. However, if you would like to attend both, you MUST register for each one separately with the links provided below. Once registered, you can attend any or all the sessions for that series.

The schedules below show the dates for each respective series. It's Your Money will be presented on Wednesdays from 10 – 11:30 am. It's Your Estate will be presented on Thursdays from 10 – 11:30 am.

It's Your Money			It's Your Estate	
April 14	Money Test & Tax Update		April 15	Estate Test & Tax Update
April 21	Annuities & Mutual Funds		April 22	Estate Planning Basics
April 28	Financial Planning I: Goals & Your Assets		April 29	Planning for Incapacity
May 5	Financial Planning II: Investing Your Money		May 6	Living Trusts
May 12	Medical Care Planning: Caregiver & Insurance		May 13	Charitable Giving
May 19	Equity Investing: How to Use Stock		May 20	Retirement Account Planning
May 26	Fixed Income Investing: How to Use Bonds		May 27	Trustee and Executor Duties
June 2	It's Your Money and Your Mind		June 3	Case Study and Review

Given that everyone's time is critical, these sessions will all be recorded and will be available about a week after each session. These videos will be available at [www.itsyourmoneyandestate.org](http://www.itsyourmoneyandestate.org).

After you register you will receive a confirmation. We will also send you a reminder email the day before each session. The "handout" material will be available at [materials.itsyourmoneyandestate.org](http://materials.itsyourmoneyandestate.org)

Please do not share your series links with anyone else. Only one person can use that link. If you share the link and they log in before you, you will not be able to get in.

Here are the two series' links:

It's Your Money <http://iymwebinar.itsyourmoneyandestate.org>

It's Your Estate <http://iyewebinar.itsyourmoneyandestate.org>

When you go to register, please make sure you scroll to the bottom of the form, click that you are not a robot and then click register.

We look forward to having you virtually attend as many of these sessions as possible.

Pete Kote and the team at It's Your Money and Estate.