ITSYOURMONEYANDESTATE.org

24361 El Toro Rd, #260, Laguna Woods, CA 92637

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

*Spring 2019 Workshop Series*

| Workshop community | Moderators | Contact |
|---|---|---|
| Orange County | Peter Kote<br>Trevor Murphy<br>Richard Huntington | Pete@ItsYourMoneyAndEstate.org<br>Trevor@ItsYourMoneyAndEstate.org<br>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:** American Heart Association, Chapman University, CHOC Children's Foundation, Financial & Estate Literacy, In Defense of Animals, Laguna Canyon Foundation, Orange Coast College Foundation, Orange County Ronald McDonald House, Orange County United Way, Salvation Army, St. Jude Memorial Foundation and Susan G. Komen® Orange County.

| City | Workshop | Venue | Day and Time |
|---|---|---|---|
| **Newport Beach**<br>949-548-2411 | "It's Your Estate!" | Newport Beach Central Library<br>1000 Avocado Street | Mondays, April 1 – May 20<br>10:00 AM to 11:30 AM |
| 04-01-19 | New Tax Update | | Zeb Law |
| 04-08-19 | Estate Planning Basics | | Carl Wayne |
| 04-15-19 | Planning for Incapacity | | Dennis Jensen |
| 04-22-19 | Living Trust and Beyond | | Timothy McElfish |
| 04-29-19 | Estate Planning for IRAs & Retirement Plans | | Michael Simon |
| 05-06-19 | Charitable Income & Tax Planning Basics | | Tony Truong |
| 05-13-19 | The Role of a Trustee & Executor | | Peter Kote |
| 05-20-18 | Case Study and Review | | Steve Bemis & Peter Kote |
| **Orange**<br>714-288-2470 | "It's Your Money!" | Orange Public Library<br>407 East Chapman Avenue | Tuesdays, March 26 - May 14<br>9:30 AM to 11:00 AM |
| 03-26-19 | New Tax Law | | Zeb Law |
| 04-02-19 | Sales Game | | Neal Rutter & Peter Kote |
| 04-09-19 | Financial Planning I | | Laurie Dubchansky |
| 04-16-19 | Financial Planning II | | Laurie Dubchansky |
| 04-23-19 | Medical Care Planning | | Lee-Anne Godfrey |
| 04-30-19 | Fixed Income Investing | | Mark Wilson |
| 05-07-19 | Equity Investing | | Matthew Pixa |
| 05-14-19 | The Big Take Away (contest) | | Meghan Coolbaugh |

| Laguna Niguel<br>949-425-5151 | "It's Your Money!" | Sea Country Center<br>24602 Aliso Creek Road | Tuesdays, April 9 – May 28<br>1:00 PM to 2:30 PM |
|---|---|---|---|
| 04-09-19 | Introduction and New Tax Law | | Marty McNamara |
| 04-16-19 | Annuities & Mutual Funds | | Neal Rutter |
| 04-23-19 | Financial Planning I | | Ashley Bleckner |
| 04-30-19 | Financial Planning II | | Ashley Bleckner |
| 05-07-19 | Medical Care Planning | | Karl Buist Baker |
| 05-14-19 | Fixed income Investing | | Mark Wilson |
| 05-21-19 | Equity Investing | | Wade Slome |
| 05-28-19 | The Big Take Away (contest) | | Megan Coolbaugh/Neal Rutter |

| Brea<br>714-990-7751 | "It's Your Money!" | Brea Senior Center<br>500 Sievers Avenue | Tuesdays, April 2 – May 21<br>1:30 PM to 3:00 PM |
|---|---|---|---|
| 04-02-19 | Introduction and New Tax Law | | George McDaniel |
| 04-09-19 | Annuities & Mutual Funds | | Peter Kote & Neal Rutter |
| 04-16-19 | Financial Planning I | | Robert McDaniel |
| 04-23-19 | Financial Planning II | | Robert McDaniel |
| 04-30-19 | Medical Care Planning | | Peter Kote |
| 05-07-19 | Fixed income Investing | | Scott Rojas |
| 05-14-19 | Equity Investing | | Michael Allbee |
| 05-21-19 | The Big Take Away (contest) | | Michael Verity |

| La Habra | "It's Your Money!" | La Habra Community Center<br>101 W. La Habra Blvd | Tuesdays, April 2 – May 21<br>2:00 PM to 3:30 PM |
|---|---|---|---|
| 04-02-19 | Introduction and New Tax Law | | C Lachman/Michael Giangrande |
| 04-09-19 | Annuities & Mutual Funds | | Jim Ripley |
| 04-16-19 | Financial Planning 1: Goals & Your Assets | | Travis McShane |
| 04-23-19 | Financial Planning 2: Investing Your Money | | Julie Bray |
| 04-30-19 | Medical Care Planning: Caregivers & Insurance | | Debbie Beatty |
| 05-07-19 | Equity Investing: How to Use Stocks | | Monica Singhania |
| 05-14-19 | Fixed Income Investing: How to Use Bonds | | Mike Verity |
| 05-21-19 | Your Money & Your Mind, plus Stock Market Contest results | | Carl Lachman |

| Irvine<br>949-724-7300 | "It's Your Estate!" | Lakeview Senior Center<br>20 Lake Road | Wednesdays, April 3 – May 22<br>1:00 PM to 2:30 PM |
|---|---|---|---|
| 04-03-19 | Introduction and New Tax Law | | Marty McNamara |
| 04-10-19 | Estate Planning Basics | | Darlynn Morgan |
| 04-17-19 | Planning for Incapacity | | Steve Giammichele |
| 04-24-19 | Living Trusts | | Cynthia V. Roehl |
| 05-01-19 | Charitable Income & Tax Planning Issues | | James Frey |
| 05-08-19 | Retirement Account Planning | | Daryl Miller |
| 05-15-19 | The Role of a Trustee & Executor | | Trevor Murphy |
| 05-22-19 | Case Study/Review | | Steve Bemis |

| Fullerton<br>714-738-6305 | "It's Your Estate!" | Fullerton Community Center<br>340 W Commonwealth Ave. Hall A & B | Wednesdays, April 3 - May 29<br>2:00 PM to 3:30 PM |
|---|---|---|---|
| 04-03-19 | Introduction & Tax Update | | C Lachman/Michael Giangrande |
| 04-10-19 | Estate Planning Basics | | Alex Varella |
| 04-17-19 | Planning for Incapacity | | Don York |
| 04-24-19 | Living Trust and Beyond | | Barbara Dibble |
| 05-01-19 | Charitable Income & Tax Planning Basics | | Tony Truong |
| 05-08-19 | Estate Planning for IRAs & Retirement Plans | | Russell Hall |
| 05-15-19 | NO CLASS | | |
| 05-22-19 | The Role of a Trustee & Executor | | Trevor Murphy |
| 05-29-19 | Case Study and Review | | Carl Lachman & Tim Blied |

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| **Huntington Beach** 714-536-5600 | "It's Your Estate!" | Senior Center in Central Park<br>18041 Goldenwest St | Wednesdays, April 3 - May 22<br>2:00 PM to 3:30 PM |
| 04-03-19 | Introduction and New Tax Law | | Mark Prendergast |
| 04-10-19 | Estate Planning Basics | | Trent Marcus |
| 04-17-19 | Planning for Incapacity | | Dennis Jensen |
| 04-24-19 | Living Trusts & More | | John Trommald |
| 05-01-19 | Charitable Income & Tax Planning Issues | | Carl Wayne |
| 05-08-19 | Retirement Account Planning | | Daryl Miller |
| 05-15-19 | The Role of a Trustee & Executor | | Peter Kote |
| 05-22-19 | Document Review | | Timothy Gray |
| **Mission Viejo** 949-470-3062 | "It's Your Estate" | Norman P. Murray Senior Center<br>24932 Veterans Way | Thursdays, April 4 – May 23<br>10:00 AM to 11:30 AM |
| 04-04-19 | Introduction and New Tax Law | | Richard Huntington |
| 04-11-19 | Estate Planning Basics | | Noelle Minto |
| 04-18-19 | Planning for Incapacity | | Eric Becker |
| 04-25-19 | Living Trust | | Steve Giammichele |
| 05-02-19 | Charitable Income & Tax Planning Issues | | James Frey |
| 05-09-19 | Retirement Account Planning | | Michael Simon |
| 05-16-19 | The Role of a Trustee & Executor | | Brian Bissell/Richard Huntington |
| 05-23-19 | Case Study/Review | | Fred Muscarella/R Huntington |
| **Costa Mesa** 714-432-5707 | "It's Your Estate" | Orange Coast Community College<br>2701 Fairview Road<br>Ronnenberg Sustainability<br>Education Center Classroom 101<br>Adams Parking Lot | Fridays, April 5 – May 24<br>10:00 AM to 11:30 AM |
| 04-05-19 | Introduction and New Tax Law | | Gina Chironis |
| 04-12-19 | Estate Planning Basics | | Lindzey Cain |
| 04-19-19 | Planning for Incapacity | | Christina McGonigle |
| 04-26-19 | Living Trusts | | Danielle Guerrero |
| 05-03-19 | Charitable Income & Tax Planning Issues | | Lindsey Jacobs |
| 05-10-19 | Retirement Account Planning | | Michael Simon |
| 05-17-19 | The Role of a Trustee & Executor | | Trevor Murphy |
| 05-24-19 | Case Study/Review | | Steve Giammichele/T Murphy |
| **Laguna Beach** 949-715-8105 | "It's Your Money!" | Susi Q Senior Center<br>380 Third Street | Fridays, April 5 – May 24<br>1:30 PM to 3:00 PM |
| 04-05-19 | Introduction/Sales Game | | Neal Rutter & Peter Kote |
| 04-12-19 | New Tax Law | | Randy Gardner |
| 04-19-19 | Financial Planning I | | Laura Tarbox |
| 04-26-19 | Financial Planning II | | Laura Tarbox |
| 05-03-19 | Medical Care Planning | | Kristine Kowalski |
| 05-10-19 | Fixed Income Investing | | Scott Anderson |
| 05-17-19 | Equity Investing | | Meghan Coolbaugh |
| 05-24-19 | 12 Step Recovery for Investors | | Mark Hebner |

# 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.*

# Financial & Estate Literacy, Inc.

**Mission**

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

**Purpose**

*We are a not-for-profit organization with a focus on financial and estate planning education. Most public workshops are about selling and we focus on* ***what is in a person's best interest****. We encourage tax-wise charitable giving that reflect your core values and believe that it is good to give. Research has shown that giving is good for you!*

**Origin**

*Peter Kote, founder of the workshop series and former charitable planning specialist, started with a simple idea: if people knew more about money and estate planning, a greater percentage of individuals would be willing to make a gif through their estate plan.*

*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 – Financial & Estate Literacy. You can look us up on https://www.guidestar.org as well as other charities.*

**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**