



IYME.ORG

17592 Irvine Blvd, Tustin, CA 92780

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

## Spring 2025 Workshop Series

WORKSHOP COMMUNITY	MODERATORS	
Financial & Estate Literacy, Inc. Orange County	Peter Kote Trevor Murphy Silvia Rosales	Richard Huntington Carl Lachman Patricia Collins

IT'S YOUR MONEY	WEEK	IT'S YOUR ESTATE
Overview & Tax Changes	1	Overview & Estate Law Changes
Financial Planning I	2	Health Care & Power of Attorney
Medical Care Planning	3	Wills & Trusts
Investment World	4	Retirement Asset Planning
Equity & Fixed Income Investing	5	Charitable Opportunities
Financial Planning II	6	Estate Administration

## OUR CHARITABLE SPONSORS



## ONLINE ZOOM WEBINAR SCHEDULE

		WORKSHOP	LOCATION AND TIME
<b>ZOOM</b>	"It's Your Money!"	Speaker	Online
04-17-25	Overview & Tax Changes	Laura Tarbox	Thursdays, April 17 – May 22  10:00 AM to 11:30 AM  Register <a href="#">here</a>
04-24-25	Financial Planning I	Thomas Anderson	
05-01-25	Medical Care Planning	Lee-Anne Godfrey	
05-08-25	Investment World	Michael Allbee & Paul Horn	
05-15-25	Equity & Fixed Income Investing	Mark Hebner	
05-22-25	Financial Planning II	Delia Fernandez	
<b>ZOOM</b>	"It's Your Estate!"	Speaker	Online
04-18-25	Overview & Estate Law Changes	Fred Muscarella	Fridays, April 18 – May 23  10:00 AM to 11:30 AM  Register <a href="#">here</a>
04-25-25	Health Care & Power of Attorney	Stephanie Winstead	
05-02-25	Wills & Trusts	Alyse M. Frederick	
05-09-25	Charitable Opportunities	Lindsey Jacobs	
05-16-25	Retirement Asset Planning	Michael Simon	
05-23-25	Estate Administration	Trevor Murphy	

## IN-PERSON WORKSHOP SCHEDULE

		WORKSHOP	LOCATION AND TIME
<b>Newport Beach</b>	"It's Your Estate!"	Speaker	Newport Beach Central Library 1000 Avocado Avenue
03-24-25	Overview & Estate Law Changes	Daryl Miller	Mondays, March 24 – April 28  10:00 AM to 11:30 AM  Register <a href="#">here</a>  Or call 949-717-3818
03-31-25	Health Care & Power of Attorney	Nena T. Sheldon	
04-07-25	Wills & Trusts	Alyse M. Frederick	
04-14-25	Retirement Asset Planning	Michael Simon	
04-21-25	Charitable Opportunities	David Moore	
04-28-25	Estate Administration	Richard Huntington	
<b>Brea</b>	"It's Your Money!"	Speaker	Brea Senior Center 500 Sievers Avenue
04-07-25	Overview & Tax Changes	Carl Lachman	Mondays, April 7 – May 12  1:00 PM to 2:30 PM  Call 714-990-7750
04-14-25	Financial Planning I	Russell Hall	
04-21-25	Medical Care Planning	Debbie Beatty	
04-28-25	Investment World	David MacLeod	
05-05-25	Equity & Fixed Income Investing	Mark Wilson	
05-12-25	Financial Planning II	Delia Fernandez	
<b>Orange</b>	"It's Your Money!"	Speaker	Orange Public Library 407 E. Chapman Ave.
04-08-25	Overview & Tax Changes	Denise Lee	Tuesdays, April 8 – May 20  10:00 AM to 11:30 AM  Register <a href="#">here</a>  Or call 714-288-2468
04-15-25	NO CLASS	NO CLASS	
04-22-25	Financial Planning I	Delia Fernandez	
04-29-25	Medical Care Planning	Lee-Anne Godfrey	
05-06-25	Investment World	Kirk Ito	
05-13-25	Equity & Fixed Income Investing	Mark Wilson	
05-20-25	Financial Planning II	Matt Pixa	

<b>Laguna Niguel</b>	<b>"It's Your Money!"</b>	<b>Speaker</b>	<b>Sea Country Center 24602 Aliso Creek Road</b>
04-15-25	Overview & Tax Changes	Marty McNamara	Tuesdays, April 15 – May 20 10:00 AM to 11:30 AM Call 949-425-5151
04-22-25	Financial Planning I	Thomas Anderson	
04-29-25	Medical Care Planning	Tara Ackley	
05-06-25	Investment World	Michael Allbee	
05-13-25	Equity & Fixed Income Investing	John Prichard	
05-20-25	Financial Planning II	Kevin Henss	
<b>Irvine</b>	<b>"It's Your Money!"</b>	<b>Speaker</b>	<b>Trabuco Center 5701 Trabuco Rd.</b>
04-02-25	Overview & Tax Changes	Marty McNamara	Wednesdays, April 02 – May 07 1:00 PM to 2:30 PM Register <a href="#">here</a> Or call 949-724-6900
04-09-25	Financial Planning I	Thomas Anderson	
04-16-25	Medical Care Planning	Tara Ackley	
04-23-25	Investment World	Michael Allbee	
04-30-25	Equity & Fixed Income Investing	Kevin Barlow	
05-07-25	Financial Planning II	Delia Fernandez	
<b>Huntington Beach</b>	<b>"It's Your Estate!"</b>	<b>Speaker</b>	<b>Senior Center in Central Park 18041 Goldenwest St.</b>
03-26-25	Overview & Estate Law Changes	Mark Prendergast	Wednesdays, March 26 – April 30 1:00 PM to 2:30 PM Register <a href="#">here</a> Or call 714-536-5600
04-02-25	Health Care & Power of Attorney	Julie Cho	
04-09-25	Wills & Trusts	Kara Rudin	
04-16-25	Charitable Opportunities	Lindsey Jacobs	
04-23-25	Retirement Asset Planning	Samantha Heflin & Audrey Johnson	
04-30-25	Estate Administration	Pete Kote	
<b>Mission Viejo</b>	<b>"It's Your Estate!"</b>	<b>Speaker</b>	<b>Norman P. Murray Senior Center 24932 Veterans Way.</b>
04-17-25	Overview & Estate Law Changes	Steve Giammichele	Thursdays, April 17 – May 29 1:00 PM to 2:30 PM Register <a href="#">here</a> Or call 949-470-3062
04-24-25	Health Care & Power of Attorney	Stephanie Winstead	
05-01-25	Wills & Trusts	Amy F. Ciftcikara	
05-08-25	NO CLASS	NO CLASS	
05-15-25	Charitable Opportunities	David Moore	
05-22-25	Retirement Asset Planning	Timothy Pickart	
05-29-25	Estate Administration	Richard Huntington	
<b>Fullerton</b>	<b>"It's Your Estate!"</b>	<b>Speaker</b>	<b>Fullerton Community Center 340 W Commonwealth Ave.</b>
04-17-25	Overview & Estate Law Changes	Austin Dillon	Thursdays, April 17 – May 22 2:00 PM to 3:30 PM Register <a href="#">here</a> Or call 714-738-6575
04-24-25	Wills & Trusts	Barbara Dibble	
05-01-25	Retirement Asset Planning	Russell Hall	
05-08-25	Charitable Opportunities	David Moore	
05-15-25	Health Care & Power of Attorney	Dan York	
05-22-25	Estate Administration	Bryan Johnson	

Laguna Beach	"It's Your Money!"	Speaker	Susi Q Senior Center 380 Third Street
04-18-25	Overview & Tax Changes	Laura Tarbox	Fridays, April 18 – May 23  1:00 PM to 2:30 PM  Register <a href="#">here</a>  Or call 949-715-8105
04-25-25	Financial Planning I	Danielle Bronner	
05-02-25	Medical Care Planning	Lee-Anne Godfrey	
05-09-25	Investment World	Kirk Ito	
05-16-25	Equity & Fixed Income Investing	Kurt Beimfohr	
05-23-25	Financial Planning II	Kevin Henss	

## 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; 9 hours of objective education over a 6-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. [Learn more](#)*

### 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 9 hours of objective education over a 6-week period, 1 ½ hours per week. Each attorney explains their fees in detail, and they do not receive your contact information. [Learn more](#)*

## 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 reflects 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 gift through their estate plan.*

*After teaching the program to staff & 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 [www.guidestar.org](http://www.guidestar.org) as well as other charities.*

**For more information email: [ReachUs@ItsYourMoneyAndEstate.org](mailto:ReachUs@ItsYourMoneyAndEstate.org)**