IYME.ORG
17592 Irvine Blvd, Tustin, CA 92780

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

Spring 2024 Workshop Series

WORKSHOP COMMUNITY	MODERATORS	CONTACT
Financial & Estate Literacy, Inc. Orange County	Peter Kote	Pete@ItsYourMoneyAndEstate.org
	Trevor Murphy	Trevor@ItsYourMoneyAndEstate.org
	Richard Huntington	Richard@ItsYourMoneyAndEstate.org
	Eugene Kim	Eugene@ ItsYourMoneyAndEstate.org

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

American Heart Association

Boys & Girls Clubs of Fullerton

Chapman University

CHOC Foundation

City of Orange Public Library Foundation

Hemlock Society of San Diego

In Defense of Animals

Laguna Beach Seniors

Laguna Canyon Foundation

Mary's Path — Changing Lives Two at a Time

nbplf — Newport Beach Public Library Foundation

Providence Mission Hospital Foundation

RMHC Southern California — Ronald McDonald House Orange County

Segerstrom Center for the Arts

Susan G. Komen

the Blue Bell Foundation for Cats

ONLINE ZOOM WEBINAR SCHEDULE

	WORKSHOP	DAY AND TIME
ZOOM Online registration	"It's Your Money!"	Thursdays, April 25 – May 30 10:00 AM to 11:30 AM
04-25-24	Overview & Tax Changes	Marty McNamara
05-02-24	Financial Planning I	
05-09-24	Medical Care Planning	
05-16-24	Investment World	Mark Hebner
05-23-24	Equity & Fixed Income Investing	Mark Wilson
05-30-24	Financial Planning II	Delia Fernandez
ZOOM Online registration	"It's Your Estate"	Fridays, April 26 – May 31 10:00 AM to 11:30 AM
04-26-24	Overview & Estate Law Changes	Blaine Searle
05-03-24	Health Care & Power of Attorney	
05-10-24	Wills & Trusts	
05-17-24	Retirement Asset Planning	Michael Simon
05-24-24	Charitable Opportunities	David Moore
05-31-24	Estate Administration	Trevor Murphy

IN-PERSON WORKSHOP SCHEDULE

CITY	WORKSHOP	VENUE	DAY AND TIME
Newport Beach 949-717-3818	"It's Your Estate!"	Newport Beach Central Library 1000 Avocado Avenue	Mondays, April 15 – May 20 10:00 AM to 11:30 AM
04-15-24	Overview & Estate Law Changes		Daryl Miller
04-22-24	Health Care & Power of Attorney		Christina McGonigle
04-29-24	Wills & Trusts		Steve Giammichele
05-06-24	Charitable Opportunities		Don Vivrette
05-13-24	Retirement Asset Planning		Michael Simon
05-20-24	Estate Administration		Richard Huntington & Trevor Murphy
Brea 714-990-7753	"It's Your Money!"	Brea Senior Center 500 Sievers Avenue	Mondays, April 22 – June 03 1:00 PM to 2:30 PM
04-22-24	Overview & Tax Changes		Robert McDaniel
04-29-24	Investment World		Jayce Lowe
05-06-24	Equity & Fixed Income Investing		Mike Verity
05-13-24	Medical Care Planning		Dorothy Lippman Salovesh
05-20-24	Financial Planning I		Chris Soukup
05-27-24	(MEMORIAL DAY)		NO CLASS
06-03-24	Financial Planning II		Chris Soukup & Jayce Lowe
Orange 714-288-2468	"It's Your Money!"	Orange Public Library 407 E. Chapman Ave.	Tuesdays, April 23 – May 28 10:00 AM to 11:30 AM
04-23-24	Overview & Tax Changes		Patrick Chu
04-30-24	Financial Planning I		Delia Fernandez
05-07-24	Medical Care Planning		Tara Ackley
05-14-24	Investment World		Michael Allbee & Paul Horn
05-21-24	Equity & Fixed Income Investing		Mark Wilson
05-28-24	Financial Planning II		Laura Tarbox

Laguna Niguel 949-425-5151	"It's Your Money!"	<u>Sea Country Center</u> 24602 Aliso Creek Road	Tuesdays, April 16 – May 21 10:00 AM to 11:30 AM
04-16-24	Overview & Tax Changes		Denise Lee
04-23-24	Financial Planning I		Laurie Dubchansky
04-30-24	Medical Care Planning		Tara Ackley
05-07-24	Investment World		Michael Allbee
05-14-24	Equity & Fixed Income Investing		Mark Wilson
05-21-24	Financial Planning II		Kevin Henss
Laguna Woods 949-212-7028	"It's Your Estate!"	<u>Laguna Woods Residents Only</u> Please contact Stuart Hack	Tuesdays, April 9 – May 14 1:00 PM to 2:30 PM
04-09-24	Overview & Estate Law Changes		Brian Mandel
04-16-24	Health Care & Power of Attorney		Kaylee Sauvey
04-23-24	Wills & Trusts		Julie Cho
04-30-24	Charitable Opportunities		Don Vivrette
05-07-24	Retirement Asset Planning		Michael Simon
05-14-24	Estate Administration		Peter Kote
Irvine 949-724-6900	"It's Your Money!"	<u>Trabuco Center</u> 5701 Trabuco Rd.	Wednesdays, April 03 - May 08 10:00 AM to 11:30 AM
04-03-24	Overview & Tax Changes		Delia Fernandez
04-10-24	Financial Planning I		Laurie Dubchansky
04-17-24	Medical Care Planning		Tara Ackley
04-24-24	Investment World		Matthew Pixa
05-01-24	Equity & Fixed Income Investing		Kevin Henss
05-08-24	Financial Planning II		Danielle Bronner
Huntington Beach 714-536-5600	"It's Your Estate!"	<u>Senior Center in Central Park</u> 18041 Goldenwest St	Wednesdays, April 24 – May 29 1:00 PM to 2:30 PM
04-24-24	Overview & Estate Law Changes		Curtis Kaiser
05-01-24	Health Care & Power of Attorney		Sheila-Marie Finkelstein
05-08-24	Wills & Trusts		Conner Clemens
05-15-24	Charitable Opportunities		David Moore
05-22-24	Retirement Asset Planning		Mark Prendergast
05-29-24	Estate Administration		Peter Kote
Mission Viejo 949-470-3062	"It's Your Estate!"	<u>Norman P. Murray Senior Center</u> 24932 Veterans Way	Thursdays, April 18 – May 23 10:00 AM to 11:30 AM
04-18-24	Overview & Estate Law Changes		Steve Giammichelle
04-25-24	Health Care & Power of Attorney		Amy Fenelli Ciftcikara
05-02-24	Wills & Trusts		Timothy Pickart
05-09-24	Retirement Asset Planning		Michael Simon
05-16-24	Charitable Opportunities		David Moore
05-23-24	Estate Administration		Richard Huntington & Lee Naujok
Fullerton 714-738-6305	"It's Your Estate!"	<u>Fullerton Community Center</u> 340 W Commonwealth Ave.	Thursdays, May 02 – June 06 2:00 PM to 3:30 PM
05-02-24	Overview & Estate Law Changes		Ella Gentile
05-09-24	Charitable Opportunities		Brett Ackerman
05-16-24	Wills & Trusts		Barbara Dibble
05-23-24	Retirement Asset Planning		Austin Dillon
05-30-24	Health Care & Power of Attorney		Dan York
06-06-24	Estate Administration		Mark McKibbin

Laguna Beach 949-715-8105	"It's Your Money!"	Susi Q Senior Center 380 Third Street	Fridays, April 19 – May 24 1:00 PM to 2:30 PM
04-19-24	Overview & Tax Changes		Marty McNamara
04-26-24	Financial Planning I		Laurie Dubchansky
05-03-24	Medical Care Planning		Kimberly Hayden
05-10-24	Investment World		Neal Rutter
05-17-24	Equity & Fixed Income Investing		Kurt Beimfohr
05-24-24	Financial Planning II		Laura Tarbox

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 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 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