FINANCIAL & ESTATE LITERACY
IT'S YOUR MONEY&ESTATE.ORG

FINANCIAL & ESTATE LITERACY
26440 La Alameda Suite 250, Mission Viejo, CA 92691

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

Fall 2026 Workshop Series

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

IT'S YOUR MONEY	WEEK	IT'S YOUR ESTATE
Your Money, Your Future (Tax Update)	1	Estate Planning Fundamentals
Smart Financial Planning I	2	Health Care & Power of Attorney
Medical Care Planning	3	Guide To Wills & Trusts
Today's Investment World	4	Strong Retirement Asset Planning
Equity & Fixed Income Investing	5	Tax Advantages for Philanthropy
Smart Financial Planning II	6	Navigating Estate Administration

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the Blue Bell FOUNDATION FOR CATS
ENSURING YOUR CAT'S FUTURE
The Priority Center
Ending the Generational Cycle of Trauma

ONLINE ZOOM WEBINAR SCHEDULE

	WORKSHOP	LOCATION AND TIME
ZOOM	"It's Your Money!"	Online
09-24-26	Your Money, Your Future (Tax Update)	Thursdays, Sept 24 – Oct 29 **10:30 AM** to 12:00 PM Register **here**
10-01-26	Smart Financial Planning I	
10-08-26	Medical Care Planning	
10-15-26	Today's Investment World	
10-22-26	Equity & Fixed Income Investing	
10-29-26	Smart Financial Planning II	
ZOOM	"It's Your Estate!"	Online
09-25-26	Estate Planning Fundamentals	Fridays, Sept 25 – Oct 30 **10:30 AM** to 12:00 PM Register **here**
10-02-26	Health Care & Power of Attorney	
10-09-26	Guide To Wills & Trusts	
10-16-26	Strong Retirement Asset Planning	
10-23-26	Tax Advantages for Philanthropy	
10-30-26	Navigating Estate Administration	

IN-PERSON WORKSHOP SCHEDULE

INTRODUCING NEW SPANISH-LANGUAGE WORKSHOP SERIES: ¡ES SU PATRIMONIO!

	WORKSHOP	LOCATION AND TIME
Costa Mesa	**¡Es Su Patrimonio!** "It's Your ESTATE!"	Biblioteca Donald Dungan 1855 Park Avenue
09-16-26	Fundamentos de la planificación patrimonial	Wednesdays, Sept 16 – Oct 21 2:00 PM to 3:30 PM Register **here** Or call 949-315-6433
09-23-26	Atención médica y poder notarial	
09-30-26	Guía de testamentos y fideicomisos	
10-07-26	Fundamentos de Bienes Raíces en su Plan Patrimonial	
10-14-26	Ventajas fiscales para la filantropía	
10-21-26	Cómo navegar la administración de herencias	

	WORKSHOP	LOCATION AND TIME
Newport Beach	"It's Your MONEY!"	NB Public Library 1000 Avocado Avenue
09-21-26	Your Money, Your Future (Tax Update)	Mondays, Sept 21 – Oct 26 10:00 AM to 11:30 AM Register **here** Call 949-717-3818
09-28-26	Smart Financial Planning I	
10-05-26	Medical Care Planning	
10-12-26	Today's Investment World	
10-19-26	Equity & Fixed Income Investing	
10-26-26	Smart Financial Planning II	
Orange	"It's Your ESTATE!"	Orange Public Library 407 E. Chapman Ave.
09-15-26	Estate Planning Fundamentals	Tuesdays, Sept 15 – Oct 20 10:00 AM to 11:30 AM Register **here** Or call 714-288-2468
09-22-26	Health Care & Power of Attorney	
09-29-26	Guide To Wills & Trusts	
10-06-26	Strong Retirement Asset Planning	
10-13-26	Tax Advantages for Philanthropy	
10-20-26	Navigating Estate Administration	

Laguna Niguel	"It's Your ESTATE"	Sea Country Center 24602 Aliso Creek Road
09-22-26	Estate Planning Fundamentals	Tuesdays, Sept 22 – Oct 27
09-29-26	Health Care & Power of Attorney	
10-06-26	Guide To Wills & Trusts	* New Time *
10-13-26	Strong Retirement Asset Planning	1:00 PM to 2:30 PM
10-20-26	Tax Advantages for Philanthropy	
10-27-26	Navigating Estate Administration	Call 949-425-5151
Irvine	"It's Your ESTATE!"	Lakeview Center 20 Lake Rd
09-16-26	Estate Planning Fundamentals	Wednesdays, Sept 16 – Oct 21
09-23-26	Health Care & Power of Attorney	
09-30-26	Guide To Wills & Trusts	1:00 PM to 2:30 PM
10-07-26	Strong Retirement Asset Planning	
10-14-26	Tax Advantages for Philanthropy	Register **here**
10-21-26	Navigating Estate Administration	Or call 949-724-6900
Huntington Beach	"It's Your MONEY!"	Senior Center in Central Park 18041 Goldenwest St.
09-16-26	Your Money, Your Future (Tax Update)	Wednesdays, Sept 16 – Oct 21
09-23-26	Smart Financial Planning I	
09-30-26	Medical Care Planning	1:00 PM to 2:30 PM
10-07-26	Today's Investment World	
10-14-26	Equity & Fixed Income Investing	Register **here**
10-21-26	Smart Financial Planning II	Call 714-536-5600
Mission Viejo	"It's Your MONEY!"	Norman P. Murray Senior Center 24932 Veterans Way.
10-08-26	Your Money, Your Future (Tax Update)	Thursdays, Oct 08 – Nov 19
10-15-26	Smart Financial Planning I	
10-22-26	Medical Care Planning	1:00 PM to 2:30 PM
10-29-26	NO CLASS	
11-05-26	Today's Investment World	Register **here**
11-12-26	Equity & Fixed Income Investing	Or call 949-470-3062
11-19-26	Smart Financial Planning II	
Laguna Beach	"It's Your ESTATE!"	Susi Q Senior Center 380 Third Street
09-15-26	Estate Planning Fundamentals	* New Day, New Time *
09-22-26	Health Care & Power of Attorney	Tuesdays, Sept 15 – Oct 20
09-29-26	Guide To Wills & Trusts	
10-06-26	Tax Advantages for Philanthropy	1:30 PM to 3:00 PM
10-13-26	Strong Retirement Asset Planning	
10-20-26	Navigating Estate Administration	Register **here**
		Or call 949-715-8105