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.<br>Orange County | Peter Kote<br>Trevor Murphy<br>Silvia Rosales | Richard Huntington<br>Patricia Collins<br>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 Priority Center
Ending the Generational Cycle of Trauma

## ONLINE ZOOM WEBINAR SCHEDULE

| | WORKSHOP | | LOCATION AND TIME |
|---|---|---|---|
| **ZOOM** | "It's Your Money!" | Speaker | Online |
| 09-24-26 | Your Money, Your Future (Tax Update) | Danielle Bronner | |
| 10-01-26 | Smart Financial Planning I | Kirk Ito | Thursdays, Sept 24 – Oct 29 |
| 10-08-26 | Medical Care Planning | Tara Ackley | |
| 10-15-26 | Today's Investment World | Paul Horn & Henry Van Buskirk | **10:30 AM** to 12:00 PM |
| 10-22-26 | Equity & Fixed Income Investing | Mark Hebner | |
| 10-29-26 | Smart Financial Planning II | Mitch Christensen | Register **here** |
| **ZOOM** | "It's Your Estate!" | Speaker | Online |
| 09-25-26 | Estate Planning Fundamentals | Matt Hytrek | |
| 10-02-26 | Health Care & Power of Attorney | Christina McGonigle | Fridays, Sept 25 – Oct 30 |
| 10-09-26 | Guide To Wills & Trusts | Jennifer Lefton | |
| 10-16-26 | Tax Advantages for Philanthropy | Lindsey Jacobs | **10:30 AM** to 12:00 PM |
| 10-23-26 | Strong Retirement Asset Planning | Michael Simon | |
| 10-30-26 | Navigating Estate Administration | Pete, Trevor & Richard | Register **here** |

## IN-PERSON WORKSHOP SCHEDULE

| | WORKSHOP | | LOCATION AND TIME |
|---|---|---|---|
| **Newport Beach** | "It's Your MONEY!" | Speaker | NB Public Library<br>1000 Avocado Avenue |
| 09-21-26 | Your Money, Your Future (Tax Update) | Marty McNamara | Mondays, Sept 21 – Oct 26 |
| 09-28-26 | Smart Financial Planning I | Carl Lachman | |
| 10-05-26 | Medical Care Planning | Lee-Anne Godfrey | 10:00 AM to 11:30 AM |
| 10-12-26 | Today's Investment World | Michael Allbee & Henry Van Buskirk | |
| 10-19-26 | Equity & Fixed Income Investing | Wes Long | Register **here** |
| 10-26-26 | Smart Financial Planning II | Jeremy Lau | Call 949-717-3818 |
| **Orange** | "It's Your ESTATE!" | Speaker | Orange Public Library<br>407 E. Chapman Ave. |
| 09-15-26 | Estate Planning Fundamentals | Julie Cho | Tuesdays, Sept 15 – Oct 20 |
| 09-22-26 | Health Care & Power of Attorney | Christina McGonigle | |
| 09-29-26 | Guide To Wills & Trusts | Leslie Daff | 10:00 AM to 11:30 AM |
| 10-06-26 | Strong Retirement Asset Planning | Michael Simon | |
| 10-13-26 | Tax Advantages for Philanthropy | David Moore | Register **here** |
| 10-20-26 | Navigating Estate Administration | Peter Kote | Or call 714-288-2468 |
| **Laguna Niguel** | "It's Your ESTATE" | Speaker | Sea Country Center<br>24602 Aliso Creek Road |
| 09-22-26 | Estate Planning Fundamentals | Greg Anderson | Tuesdays, Sept 22 – Oct 27 |
| 09-29-26 | Health Care & Power of Attorney | Steph Winstead | |
| 10-06-26 | Guide To Wills & Trusts | Amy Fenelli | * New Time * |
| 10-13-26 | Tax Advantages for Philanthropy | David Moore | 1:00 PM to 2:30 PM |
| 10-20-26 | Strong Retirement Asset Planning | Mike Simon | |
| 10-27-26 | Navigating Estate Administration | Richard H. + Maria U. | Call 949-425-5151 |

| **Irvine** | "It's Your ESTATE!" | Speaker | Lakeview Center<br>20 Lake Rd |
|---|---|---|---|
| 09-16-26 | Estate Planning Fundamentals | Kaylee Sauvey | Wednesdays, Sept 16 – Oct 21 |
| 09-23-26 | Health Care & Power of Attorney | Chistina McGonigle | |
| 09-30-26 | Guide To Wills & Trusts | Kara Rudin | 1:00 PM to 2:30 PM |
| 10-07-26 | Tax Advantages for Philanthropy | Don Vivrette | |
| 10-14-26 | Strong Retirement Asset Planning | Daryl Miller | Register **here** |
| 10-21-26 | Navigating Estate Administration | Trevor Murphy | Or call 949-724-6900 |

| **Huntington Beach** | "It's Your MONEY!" | Speaker | Senior Center in Central Park<br>18041 Goldenwest St. |
|---|---|---|---|
| 09-16-26 | Your Money, Your Future (Tax Update) | Patrick Chu | Wednesdays, Sept 16 – Oct 21 |
| 09-23-26 | Smart Financial Planning I | Delia Fernandez | |
| 09-30-26 | Medical Care Planning | Tara Ackley | 1:00 PM to 2:30 PM |
| 10-07-26 | Today's Investment World | Thomas Anderson | |
| 10-14-26 | Equity & Fixed Income Investing | John Prichard | Register **here** |
| 10-21-26 | Smart Financial Planning II | Evelyn Zohlen & Tamara Durbin | Call 714-536-5600 |

| **Mission Viejo** | "It's Your MONEY!" | Speaker | Norman P. Murray Senior Center 24932 Veterans Way. |
|---|---|---|---|
| 10-08-26 | Your Money, Your Future (Tax Update) | Marty McNamara | Thursdays, Oct 08 – Nov 19 |
| 10-15-26 | Smart Financial Planning I | Henry Van Buskirk | |
| 10-22-26 | Medical Care Planning | Tara Ackley | 1:00 PM to 2:30 PM |
| 10-29-26 | NO CLASS | | |
| 11-05-26 | Today's Investment World | John Prichard | Register **here** |
| 11-12-26 | Equity & Fixed Income Investing | Delia Fernandez | Or call 949-470-3062 |
| 11-19-26 | Smart Financial Planning II | Laurie Dubchansky | |

| **Laguna Beach** | "It's Your ESTATE!" | Speaker | Susi Q Senior Center<br>380 Third Street |
|---|---|---|---|
| 09-15-26 | Estate Planning Fundamentals | Kaylee Sauvey | * New Day, New Time * |
| 09-22-26 | Health Care & Power of Attorney | Peter McMahon | Tuesdays, Sept 15 – Oct 20 |
| 09-29-26 | Guide To Wills & Trusts | NIcholas Kmetz | |
| 10-06-26 | Strong Retirement Asset Planning | Michael Simon | 1:30 PM to 3:00 PM |
| 10-13-26 | Tax Advantages for Philanthropy | Don Vivrette | |
| 10-20-26 | Navigating Estate Administration | Pete, Trevor & Richard | Register **here** |
| | | | Or call 949-715-8105 |