

Peter C. Kote JD

Curriculum Vitae

Peter Kote, received the Financial Planning Association's *Heart of Financial Planning Distinguished Service Award*, a national award given for advancing the profession of financial planning:

"Peter Kote, J.D., has a personal finance workshop series' "It's Your Money" and "It's Your Estate," which educates the public on the importance of financial literacy so they are better prepared to protect their own financial interests from predatory sales techniques." (from FPA press release)

Work Experience

Mr. Kote is founder of Professional Fiduciary Services (PFS), private professionals who serve in fiduciary capacities including trustee, executor, conservator, or agent for the Advance Health Care Directive, Durable or General Power of Attorney for Asset and Property Management. The vision of PFS is to offer ethical, qualified and personable independent fiduciaries who work together to provide quality service for their clients. Mr. Kote's clients range in age of seven to ninety eight years old.

Mr. Kote has been a professional fiduciary since 1996. Prior to this, he was in the gift-planning arena and worked for a variety of non-profits. He has been involved in raising over \$500 million for various charities. Mr. Kote's previous non-profit employment was with Father Flanagan's Boys' Town out of Omaha, Nebraska; Casa Colina Rehabilitation Hospital Foundation; The National Financial Planning Foundation; The American Heart Association, American Red Cross, Long Beach State University, The National Conference of Christians and Jews, The Youth Development Project and South County Senior Services.

Mr. Kote's financial planning experience comes from his work with the Financial Planning Association. Mr. Kote also served as a trust officer with First Atlanta Bank and Wachovia Bank in Atlanta.

Education

Father Flanagan's Boys & Girls Town – Family Teacher Credential, 1991

Western State University College of Law, Jurist Doctorate 1980

California State University, Long Beach – Communicative Disorders; worked on an Education Credential, Special Education Credential and Masters (No Degree Earned) 1974/1977

California State University, Fullerton – Bachelor of Arts, Communication major 1971

Volunteer Leadership Positions

Laguna Canyon Foundation – Board Member

Financial Empowerment & Estate Literacy (FEEL) – Founder & Board Chair of the "It's Your Money" & "It's Your Estate" workshop series

Registrations

Orange County Bar Association section Trust & Estates – member

California Fiduciary Bureau – License #268

Orange County Planned Giving Roundtable – Member

Orange Coast Estate Planning Council – Member