



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 Trevor Murphy Richard Huntington Eugene Kim	Pete@ItsYourMoneyAndEstate.org Trevor@ItsYourMoneyAndEstate.org Richard@ItsYourMoneyAndEstate.org 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

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## ONLINE ZOOM WEBINAR SCHEDULE

	WORKSHOP	DAY AND TIME
<b>ZOOM</b> 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
<b>ZOOM</b> 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	Kaylee Sauvey
05-10-24	Wills & Trusts	Leslie Daff
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
<b>Newport Beach</b> 949-717-3818	"It's Your Estate!"	<u>Newport Beach Central Library</u> 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
<b>Brea</b> 714-990-7753	"It's Your Money!"	<u>Brea Senior Center</u> 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
<b>Orange</b> 714-288-2468	"It's Your Money!"	<u>Orange Public Library</u> 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

<b>Laguna Niguel</b> 949-425-5151	<b>"It's Your Money!"</b>	<u>Sea Country Center</u> 24602 Aliso Creek Road	Tuesdays, April 16 – May 21 10:00 AM to 11:30 AM
<b>Laguna Woods</b> 949-212-7028	<b>"It's Your Estate!"</b>	<u>Laguna Woods Residents Only</u> Please contact Stuart Hack	Tuesdays, April 9 – May 14 1:00 PM to 2:30 PM
<b>Irvine</b> 949-724-6900	<b>"It's Your Money!"</b>	<u>Trabuco Center</u> 5701 Trabuco Rd.	Wednesdays, April 03 - May 08 10:00 AM to 11:30 AM
<b>Huntington Beach</b> 714-536-5600	<b>"It's Your Estate!"</b>	<u>Senior Center in Central Park</u> 18041 Goldenwest St	Wednesdays, April 24 – May 29 1:00 PM to 2:30 PM
<b>Mission Viejo</b> 949-470-3062	<b>"It's Your Estate!"</b>	<u>Norman P. Murray Senior Center</u> 24932 Veterans Way	Thursdays, April 18 – May 23 10:00 AM to 11:30 AM
<b>Fullerton</b> 714-738-6305	<b>"It's Your Estate!"</b>	<u>Fullerton Community Center</u> 340 W Commonwealth Ave.	Thursdays, May 02 – June 06 2:00 PM to 3:30 PM

<b>Laguna Beach</b> 949-715-8105	<b>"It's Your Money!"</b>	<b>Susi Q Senior Center</b> 380 Third Street	<b>Fridays, April 19 – May 24</b> 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](http://www.guidestar.org) as well as other charities.*

**For more information, please contact Trevor Murphy, President & CEO of Financial & Estate Literacy or [ItsYourMoneyAndEstate.org](http://ItsYourMoneyAndEstate.org)**

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