



# Stu News Laguna

Stu Saffer's Laguna Beach News and Community Forum



## **Financial planning – It's Your Estate – at Susi Q Center**



**Peter Kote**

Financial planning is critical to ensure that you can live comfortably with confidence, provide for the people you love, and leave a lasting legacy.

Beginning on Fridays for eight weeks, April 3 to May 22, at The Susi Q, Laguna Beach Community Foundation and Laguna Beach Seniors will offer an award-winning financial series to help seniors do just that.

Peter Kote, founder of Professional Fiduciary Services and a co-founder of the Laguna Beach Community Foundation, will moderate the workshops and assemble a team of skilled presenters from the financial and insurance industries.

Kote has been presenting, It's Your Money and It's, Your Estate workshops at regional nonprofits since 1995 solely for educational purposes. No one will ask you for a donation, put your name on a mailing list, or try to sell you financial or insurance products.

Topics include:

April 3: Intro & Quiz by Peter Kote

April 10: Annuities & Mutual Funds by Peter Kote

April 17: Financial Planning I by Laura Tarbox

April 24: Financial Planning II by Laura Tarbox

May 1: Long Term Care by Andrea Deerhart

May 8: Fixed Income Investing by Jim Fletcher

May 15: Equity Investing by Matt Balaker

May 22: The Big Take Away (contest) by Daniel Sexton & Kirk Ito

The free workshops from April 3-May 22, 1:30-3 p.m. are sponsored by Laguna Beach Community Foundation and Laguna Beach Seniors as a community service. Reservations are required and can be made by calling 497-2441 or by emailing [info@thesusiq.org](mailto:info@thesusiq.org). The Susi Q Senior Center is at 380 Third St.