Financial Empowerment & Estate Literacy, Inc.
23601 Moulton Parkway, Laguna Hills, CA 92653

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

Fall 2015 Workshop Series

workshop community	Moderator	contact
Orange County	Peter Kote	pkote@cox.net

It's Your Money	WEEK	It's Your Estate
Introduction and Quiz	**1**	Introduction and Quiz
Annuities and Mutual Funds	**2**	Estate Planning Basics
Financial Planning I	**3**	Legal documents
Financial Planning II	**4**	Advanced Estate Planning
Long Term Care	**5**	Tax Planning Issues
Equity Investing	**6**	Retirement Plan Distributions
Fixed Income Investing	**7**	The Trustee and Executor
The Big Takeaway	**8**	Case Study and Review

Charitable Sponsors: The American Heart Association, Chapman University, California State Parks Foundation, CHOC Children's Foundation, Financial Empowerment & Estate Literacy, Laguna Canyon Foundation, Mission Hospital Foundation, Ocean Institute, Orange Coast Community College, PBS SoCal, St Joseph Hospital Foundation and St Jude Memorial Foundation

City	Workshop	Venue	Day and Time
Newport Beach 949-548-2411	"It's Your Money!"	Newport Beach Central Library 1000 Avocado Street	Mondays, September 14 – November 2 10:00 AM to 11:30 AM
09-14-15	Introduction & Quiz		Peter Kote
09-21-15	Annuities & Mutual Funds		Peter Kote
09-28-15	Financial Planning I		Laura Tarbox
10-05-15	Financial Planning II		Laura Tarbox
10-12-15	Long Term Care		Carole Ann Burr
10-19-15	Equity Investing		Patrick Powers
10-26-15	Fixed Income Investing		Scott Anderson
11-02-15	The Big Take Away & Contest		Mark Rylance
Irvine 949-724-6926	"It's Your Money!"	Lakeview Senior Center 20 Lake Road	Mondays, September 14 – November 2 1:30 PM to 3:00 PM
09-14-15	Introduction & Quiz		Peter Kote
09-21-15	Annuities & Mutual Funds		Peter Kote
09-28-15	Financial Planning I		William Cuthbertson
10-05-15	Financial Planning II		William Cuthbertson
10-12-15	Long Term Care		Carole Ann Burr
10-19-15	Equity Investing		Michael Allbee
10-26-15	Fixed Income Investing		Jim Fletcher
11-02-15	The Big Take Away & Contest		Daniel Sexton

Orange 714-347-7900	"It's Your Estate!"	Orange Public Library 407 East Chapman Avenue	Tuesdays, September 22 – November 17 10:00 AM to 11:30 AM
09-22-15	Introduction & Quiz		Peter Kote
09-29-15	Estate Planning Basics		Shauna Anderson
10-06-15	AHCD, Power of Attorney, Conservator		Evelyn Leathers
10-13-15	Living Trust & More		James Leese
10-20-15	Charitable Income & Tax Planning Issues		Carolyn White
10-27-15	No Class		
11-03-15	IRA & Retirement Plan Distributions		Michael Simon
11-10-15	The Role of a Trustee & Executor		Peter Kote & Corporate Trust
11-17-15	Case Study/Review		Peter Kote & Larry Bemis

Laguna Niguel 949-425-5151	"It's Your Estate!"	Sea Country Center 24602 Aliso Creek Road	Tuesdays, September 15 – November 3 1:00 PM to 2:30 PM
09-15-15	Introduction & Quiz		Richard Huntington
09-22-15	Estate Planning Basics		Lynee Kniss
09-29-15	AHCD, Power of Attorney, Conservator		Amy Haupert
10-06-15	Living Trust & More		Valisa Carney
10-13-15	Charitable Income & Tax Planning Issues		David Moore
10-20-15	IRA & Retirement Plan Distributions		Timothy Pickart
10-27-15	The Role of a Trustee & Executor		Richard Huntington & Corporate Rep
11-03-15	Case Study/Review		Richard Huntington & Steve Bemis

Brea 714-992-3033	"It's Your Estate!"	Brea Senior Center 500 Sievers Avenue	Tuesdays, September 15 – November 3 1:30 PM to 3:00 PM
09-15-15	Introduction & Quiz		Peter Kote
09-22-15	Estate Planning Basics		Holly Nabiey
09-29-15	AHCD, Power of Attorney, Conservator		Timothy Gray
10-06-15	Living Trust & More		Alan Davis
10-13-15	Charitable Income & Tax Planning Issues		Carolyn Swanson
10-20-15	IRA & Retirement Plan Distributions		Daryl Miller
10-27-15	The Role of a Trustee & Executor		Peter Kote & Corporate Trust
11-03-15	Case Study/Review		Peter Kote & Larry Bemis

Dana Point 949-496-2274	"It's Your Money!"	Ocean Institute 24200 Dana Point Harbor Drive	Wednesdays, September 16 – November 4 1:30 PM to 3:00 PM
09-16-15	Introduction & Quiz		Peter Kote
09-23-15	Annuities & Mutual Funds		Peter Kote
09-30-15	Financial Planning I		Mark Rylance
10-07-15	Financial Planning II		Mark Rylance
10-14-15	Long Term Care		Carole Ann Burr
10-21-15	Equity Investing		Wade Slome
10-28-15	Fixed Income Investing		Kurt Beimfohr
11-04-15	The Big Take Away & Contest		Kirk Ito

Fullerton 714-738-6305	"It's Your Money!"	Fullerton Community Center 340 W Commonwealth Avenue	Thursdays, September 17 – November 5 2:00 PM to 3:30 PM
09-17-15	Introduction & Quiz		Peter Kote
09-24-15	Annuities & Mutual Funds		Peter Kote
10-01-15	Financial Planning I		Carl Lachman
10-08-15	Financial Planning II		Carl Lachman
10-15-15	Long Term Care		Carole Ann Burr
10-22-15	Equity Investing		Edward & Gary Rennie
10-29-15	Fixed Income Investing		Michael Verity
11-05-15	The Big Take Away & Contest		Robert McDaniel
Mission Viejo 949-470-3062	"It's Your Money!"	Norman P. Murray Senior Center 24932 Veterans Way	Fridays, September 18 – November 6 10:00 AM to 11:30 AM
09-18-15	Introduction & Quiz		Richard Huntington
09-25-15	Annuities & Mutual Funds		Richard Huntington
10-02-15	Financial Planning I		Marty McNamera
10-09-15	Financial Planning II		Patrick Chu
10-16-15	Long Term Care		Carole Ann Burr
10-23-15	Equity Investing		Matt Balaker
10-30-15	Fixed Income Investing		Scott Walker
11-06-15	The Big Take Away & Contest		Daniel Sexton
Costa Mesa	"It's Your Money!"	Orange Coast Community College Student Union Center 2701 Fairview Road	Fridays, September 25 – Nov 13 10:00 AM to 11:30 AM
09-25-15	Introduction & Quiz		Peter Kote
10-02-15	Annuities & Mutual Funds		Peter Kote
10-09-15	Financial Planning I		Delia Fernandez
10-16-15	Financial Planning II		Delia Fernandez
10-23-15	Long Term Care		Carole Anne Burr
10-30-15	Equity Investing		Evelyn Zohlen
11-06-15	Fixed Income Investing		Lauren Klein
11-13-15	The Big Take Away & Contest		Julie Bray
Laguna Beach 949-715-8223	"It's Your Estate!"	Laguna Beach Senior Center 380 Third Street	Fridays, September 18 – November 6 1:30 PM to 3:00 PM
09-18-15	Introduction & Quiz		Peter Kote
09-25-15	Estate Planning Basics		Nicole Anderson
10-02-15	AHCD, Power of Attorney, Conservator		Keith Wisbaum
10-09-15	Living Trust & More		Leslie Daff
10-16-15	Charitable Income & Tax Planning Issues		Debra Cox
10-23-15	IRA & Retirement Plan Distributions		Michael Simon
10-30-15	The Role of a Trustee & Executor		Peter Kote & Corporate Trust
11-06-15	Case Study/Review		Peter Kote & Steve Bemis

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 Empowerment & Estate Literacy, Inc.

Mission

To provide the resources people need to make confident financial, estate & charitable decisions.

Purpose

We are a not-for-profit community resource, filled with financial and estate planning education that, at all times, will focus on what is ***in your best interest.*** *We encourage tax-wise charitable giving that reflect your core values.*

Origin

Peter Kote, founder of the workshop series and former planned giving director, started with a simple idea 20 years ago: if people knew more about money and estate planning, a greater percentage of individuals would be willing to make a planned gift.

After teaching the program to faculty members at Long Beach State University, Peter recognized the overwhelming need for unbiased financial and estate planning education. Since its fruition, the workshops have grown in size and popularity. In 2008, 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. Currently, the workshops are offered in Orange County, California with hopes of expansion in the near future.