FEELinControl.org
24033 El Toro Road, Suite 130, Laguna Hills, CA 92653

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

Spring 2016 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**	Planning for Incapacity
Financial Planning II	**4**	Living Trusts
Long Term Care Planning	**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, California State Parks Foundation, Laguna Beach Community Foundation, Chapman University, CHOC Children's Foundation, FEELinControl.org, Laguna Canyon Foundation, Mission Hospital Foundation, Orange Coast College Foundation, PBS SoCal, Segerstrom Center for the Arts, St. Jude Memorial Foundation, and St. Joseph Foundation.

City	Workshop	Venue	Day and Time
Newport Beach 949-548-2411	"It's Your Estate!"	Newport Beach Central Library 1000 Avocado Street	Mondays, April 4 – May 23 10:00 AM to 11:30 AM
04-04-16	Introduction & Quiz		Peter Kote
04-11-16	Estate Planning Basics		Bradley Erdosi
04-18-16	Planning for Incapacity		Teresa Gorman
04-25-16	Living Trusts		James Leese
05-02-16	Charitable Income & Tax Planning Issues		David Moore
05-09-16	IRA & Retirement Plan Distributions		Michael Simon
05-16-16	The Role of a Trustee & Executor		Peter Kote & Shelley O'Byrne
05-23-16	Case Study/Review		Peter Kote & Larry Bemis
Irvine 949-724-6926 **PRE-REGISTRATION REQUIRED**	"It's Your Estate!"	Lakeview Senior Center 20 Lake Road	Mondays, April 4 – May 23 1:30 PM to 3:00 PM
04-04-16	Introduction & Quiz		Trevor Murphy
04-11-16	Estate Planning Basics		Daryl Miller
04-18-16	Planning for Incapacity		Dennis Jensen
04-25-16	Living Trusts		Max Alavi
05-02-16	Charitable Income & Tax Planning Issues		Deb Cox
05-09-16	IRA & Retirement Plan Distributions		Brian Mandel
05-16-16	The Role of the Trustee & Executor		Trevor Murphy & Shelley O'Byrne
05-23-16	Case Study/Review		Trevor Murphy & Steve Bemis

Orange 714-347-7900	"It's Your Money!"	Orange Public Library 407 East Chapman Avenue	Tuesdays, March 29 - May 17 9:30 AM to 11:00 AM
03-29-16	Introduction & Quiz		Peter Kote
04-05-16	Annuities & Mutual Funds		Peter Kote & Neal Rutter
04-12-16	Long Term Care Planning		Carole Ann Burr
04-19-16	Financial Planning I		Marty McNamara
04-26-16	Financial Planning II		Patrick Chu
05-03-16	Fixed Income Investing		Scott Anderson
05-10-16	Equity Investing		Patrick Powers
05-17-16	The Big Take Away (contest)		Julie Bray
Laguna Niguel 949-425-5151	"It's Your Money!"	Sea Country Center 24602 Aliso Creek Road	Tuesdays, April 5 – May 24 1:00 PM to 2:30 PM
04-05-16	Introduction & Quiz		Richard Huntington
04-12-16	Annuities & Mutual Funds		Richard Huntington
04-19-16	Financial Planning I		William Cuthbertson
04-26-16	Financial Planning II		William Cuthbertson
05-03-16	Long Term Care Planning		Carole Ann Burr
05-10-16	Fixed income Investing		Kurt Beimfohr
05-17-16	Equity Investing		Wade Slome
05-24-16	The Big Take Away (contest)		Megan Coolbaugh

Brea 714-992-3033	"It's Your Money!"	Brea Senior Center 500 Sievers Avenue	Tuesdays, April 5 – May 24 1:30 PM to 3:00 PM
04-05-16	Introduction & Quiz		Peter Kote
04-12-16	Annuities & Mutual Funds		Peter Kote & Neal Rutter
04-19-16	Financial Planning I		Robert McDaniel
05-26-16	Financial Planning II		Robert McDaniel
05-03-16	Long Term Care Planning		Carole Ann Burr
05-10-16	Fixed income Investing		Jim Fletcher
05-17-16	Equity Investing		Patrick Powers
05-24-16	The Big Take Away (contest)		Carl Lachman
Fullerton 714-738-6305	"It's Your Estate!"	Fullerton Community Center 340 W Commonwealth Avenue Grand Hall A & B	Wednesdays, April 6 – May 25 2:00 PM to 3:30 PM
04-06-16	Introduction & Quiz		Peter Kote
04-13-16	Estate Planning Basics		Max Alavi
04-20-16	Planning for Incapacity		Dennis Jensen
04-27-16	Living Trust		Robert Pearson
05-04-16	Charitable Income & Tax Planning Issues		Carolyn Swanson & Amanda Ferrari
05-11-16	IRA & Retirement Plan Distributions		Michael Simon
05-18-16	The Role of a Trustee & Executor		Peter Kote & Shelly O'Byrne
05-25-16	Case Study/Review		Peter Kote & Steve Bemis

Costa Mesa 714-432-5707	"It's Your Estate"	Orange Coast Community College Student Center Classroom 2701 Fairview Road	Fridays, April 8 – June 3 10:00 AM to 11:30 AM
04-08-16	Introduction & Quiz		Trevor Murphy
04-15-16	Estate Planning Basics		Christian Graham
04-22-16	Planning for Incapacity		Will Brodak
04-29-16	Living Trust		Tim McElfish
05-06-16	Charitable Income & Tax Planning Issues		Lindsey & David Moore
05-13-16	IRA & Retirement Plan Distributions		Michael Simon
05-20-16	The Role of a Trustee & Executor		Trevor Murphy & Shelley O'Byrne
05-27-16	No Class		
06-03-16	Case Study/Review		Trevor Murphy & Steve Bemis

Mission Viejo 949-470-3062	"It's Your Estate"	Norman P. Murray Senior Center 24932 Veterans Way	Fridays, April 8 – June 3 10:00 AM to 11:30 AM
04-08-16	Introduction & Quiz		Richard Huntington
04-15-16	Estate Planning Basics		Lynee Kniss
04-22-16	Planning for Incapacity		Edward Wallace
04-29-16	Living Trust		Fred Muscarella
05-06-16	Charitable Income & Tax Planning Issues		Jim Frey
05-13-16	No Class		
05-20-16	IRA & Retirement Plan Distributions		Daryl Miller
05-27-16	The Role of a Trustee & Executor		Richard Huntington & Shelley O'Bryne
06-03-16	Case Study/Review		Richard Huntington & Steve Bemis

Laguna Beach 949-715-8223	"It's Your Money!"	Laguna Beach Senior Center 380 Third Street	Fridays, April 8 – May 27 1:30 PM to 3:00 PM
04-08-16	Introduction & Quiz		Peter Kote
04-15-16	Annuities & Mutual Funds		Peter Kote & Neal Rutter
04-22-16	Financial Planning I		Laura Tarbox
04-29-16	Financial Planning II		Laura Tarbox
05-06-16	Long Term Care Planning		Andrea Deerheart
05-13-16	Fixed Income Investing		Scott Walker
05-20-16	Equity Investing		Mathew Pixa
05-27-16	The Big Take Away (contest)		Meghan Coolbaugh

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.

FEELinControl.org

Mission
To prevent financial abuse by educating seniors to take control of their financial, estate, and charitable giving decisions.

Purpose
We are a not-for-profit community resource center, 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 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.

For more information, please contact Trevor Murphy, President & CEO of Financial & Estate Literacy or FEELinControl.org

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