

IT'S YOUR ESTATE/MONEY WORKSHOPS

Spring 2010

- 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.

OUR MISSION – To promote self-awareness of our own financial and estate plans; learn practical suggestions on how to find competent and ethical advisors and encourage tax-wise charitable giving.

CHARITABLE SPONSORS: The Ocean Institute, Laguna Canyon Foundation, American Heart Association, Orange County Community Foundation, Laguna Moulton Playhouse, KOCE-TV, Arthritis Foundation, Children's Hospital of Orange County and St. Joseph Hospital Foundation.

Newport Beach Central Library – It's Your Estate (Mondays 10:00 AM to 11:30 AM) 1000 Avocado, Newport Beach - **RESERVATIONS** – Call Janis Dinwiddie at 949.548.2411 or email: info@nblibraryevents.com

04-05-10 Introduction/Quiz – Peter Kote
04-12-10 Estate Planning Basics – Cheryl Barrett
04-19-10 Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets – Donna Bashaw
04-26-10 Advanced Estate Planning – Mark Doyle
05-03-10 Charitable Income & Tax Planning Issues – Roland Ho & Jeff Swanson
05-10-10 IRA; 401k; 403b and 457 plans distributions – Matt Brown
05-17-10 The Role of a Trustee & Executor – Ken Petersen
05-24-10 Case Study/Review – Peter Kote

Irvine Lakeview Senior Center – It's Your Estate (Mondays 1:30 PM to 3:00 PM) 20 Lake Road Irvine
RESERVATIONS – Call the Keen Center at (949) 724-6926

04-05-10 Introduction & Quiz – Peter Kote
04-12-10 Estate Planning Basics – Brian Mandel
04-19-10 Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets - Will Brodak
04-26-10 Advanced Estate Planning – Jeff Carchidi
05-03-10 Charitable Income & Tax Planning Issues – Roland Ho & Jeff Swanson
05-10-10 IRA; 401k; 403b and 457 Plans Distributions – Toni DeGasperin
05-17-10 The Role of a Trustee & Executor – Peter Kote & Ken Petersen
05-24-10 Case Study/Review – Peter Kote

Laguna Hills Florence Sylvester Senior Center – It's Your Money (Tuesdays 2:30 PM to 4:00 PM)
23721 Moulton Pkwy Laguna Hills, CA 92653 **RESERVATIONS:** Call Guine at (949) 497-8324

04-20-10 Introduction & Quiz – Peter Kote
04-27-10 Annuities & Mutual Funds – Peter Kote
05-04-10 Financial Planning I – David Duttenhofer
05-11-10 Financial Planning II – David Duttenhofer
05-18-10 Long Term Care – Carole Ann Burr
05-25-10 Fixed Income Investing – Patrick Powers
06-01-10 Equity Investing – Bryan Wisda
06-08-10 Investment Rules and Stock Market Contest – David Duttenhofer

Orange Public Library – It's Your Money (Wednesdays 12:00 - 1:30 PM)
407 E. Chapman Avenue **RESERVATIONS:** Call Julie Kramer at (714) 288-2470 or Monica Hunter at (714) 771-8211

04-07-10 Introduction & Quiz – Peter Kote
04-14-10 Annuities & Mutual Funds – Peter Kote
(April 21 – No session)
04-28-10 Financial Planning Part I – Mark Wilson
05-05-10 Financial Planning II – Mark Wilson
05-12-10 Long Term Care – Carole Ann Burr
05-19-10 Fixed Income Investing – Christine Blanchard
05-26-10 Equity Investing – Kevin O'Grady
06-02-10 Investment Rules & Stock Market Contest – Peter Kote & Bryan Wisda

Fullerton Senior Center – It's Your Estate (Wednesday 2:00 to 3:30 PM) Fullerton Service Center
340 W. Commonwealth Ave, Fullerton **RESERVATIONS – Call the center (714) 738-6305**

04-07-10 Introduction/Quiz – Peter Kote
04-14-10 Estate Planning Basics – Barbara Dibble
04-21-10 Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets – Marty Burbank
04-28-10 Advanced Estate Planning – Jerry Mackey
05-05-10 Charitable Income & Tax Planning Issues – Roland Ho & Jeff Swanson
05-12-10 IRA; 401k; 403b and 457 Plans Distributions – David Harrison
05-19-10 The Role of a Trustee & Executor – Peter Kote & Ken Petersen
05-26-10 Case Study/Review – Peter Kote

Dana Point – It's Your Estate (Thursday 9:30 AM to 11:00 AM)
Ocean Institute 24200 Dana Point Harbor Drive **RESERVATIONS – Call the Institute (949) 496-2274**

04-08-10 Introduction/Quiz – Peter Kote
04-15-10 Estate Planning Basics – Timothy Pickart
04-22-10 Advanced Health Care Directive; Conservatorship & Power of Attorney over – Lee Andersen
04-29-10 Advanced Estate Planning – James Leese
05-06-10 Charitable Income & Tax Planning Issues – Roland Ho & Jeff Swanson
05-13-10 IRA; 401k; 403b and 457 Plans Distributions – Toni DeGasperin
05-20-10 The Role of a Trustee & Executor – Peter Kote & Ken Petersen
05-27-10 Case Study/Review – Peter Kote

Laguna Niguel Senior Center Sea Country – It's Your Money (Thursdays 1:00 PM to 2:30 PM)
24602 Aliso Creek Road, Laguna Niguel **RESERVATIONS – Call the Senior Center for reservations/directions: 949.425.5151**

04-01-10 Introduction & Quiz – Peter Kote (Moderated by: Richard Huntington)
04-08-10 Annuities & Mutual Funds – Peter Kote
04-15-10 Financial Planning I – Mark Wilson
04-22-10 Financial Planning II – Mark Wilson
04-29-10 Long Term Care – Carole Ann Burr
05-06-10 Fixed Income Investing – Scott Walker
05-13-10 Equity Investing – Christine Blanchard & Chris Candela
05-20-10 Investment Rules and Stock Market Contest – Peter Kote & Wade Slome

Mission Viejo Norman P. Murray Community & Senior Center – It's Your Estate (Friday 10:00 AM to 11:30 AM)
24932 Veterans Way, Mission Viejo **RESERVATIONS – Call the Senior Center: (949) 470-3062**

04-02-10 Introduction/Quiz – Peter Kote
04-09-10 Estate Planning Basics – Robert Adams
04-16-10 Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets – Ken Wassner
04-23-10 Advanced Estate Planning – James Leese
04-30-10 Charitable Income & Tax Planning Issues – Roland Ho & Jeff Swanson
05-07-10 IRA; 401k; 403b and 457 Plans Distributions – Toni DeGasperin
05-14-10 The Role of a Trustee & Executor – Peter Kote & Ken Petersen
05-21-10 Case Study/Review – Peter Kote

Laguna Beach Senior Center – It's Your Money (Friday 1:30 PM – 3:00 PM)
Community Conference Room, Laguna Beach **RESERVATIONS - Call Guine at 949-497-8324**

04-02-10 Introduction & Quiz – Peter Kote
04-09-10 Annuities & Mutual Funds – Peter Kote
04-16-10 Financial Planning I – Laura Tarbox
04-23-10 Financial Planning II – Laura Tarbox
04-30-10 Fixed Income Investing – Christine Blanchard
05-07-10 Long Term Care – Carole Ann Burr
05-14-10 Equity Investing – Christine Blanchard
05-21-10 Investment Rules and Stock Market Contest – Peter Kote & Wade Slome