

# IT'S YOUR ESTATE/MONEY WORKSHOPS

## Spring 2012

- **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 to your charity(s) that represents your values and interests.

**CHARITABLE SPONSORS:** The Ocean Institute, Laguna Canyon Foundation, Mission Hospital Foundation, American Heart Association, Orange County Community Foundation, Foundation for the Great Park, PBS SoCal, Chapman University 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

04-02-12 Introduction/Quiz – Peter Kote

04-09-12 Estate Planning Basics –

04-16-12 Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets –

04-23-12 Advanced Estate Planning –

04-30-12 Charitable Income & Tax Planning Issues –

05-07-12 IRA; 401k; 403b AND 457 Plans Distributions –

05-14-12 The Role of a Trustee & Executor –

05-21-12 Case Study and Review –

**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

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**Dana Point – It's Your Estate (Tuesdays 2:00 PM to 3:30 PM)** Ocean Institute 24200 Dana Point Harbor Drive **RESERVATIONS** – Call the Institute (949) 496-2274

04-03-12 Introduction/Quiz – Peter Kote

04-10-12 Estate Planning Basics –

04-17-12 Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets –

04-24-12 Advanced Estate Planning –

**05-01-12 No Class**

05-08-12 Charitable Income & Tax Planning Issues –

05-15-12 IRA; 401k; 403b and 457 Plans Distributions –

05-22-12 The Role of a Trustee & Executor –

05-29-12 Case Study/ Review –

**Orange - St. Joseph Special Events Center – It's Your Money (Wednesdays 10:00 AM – 11:30 AM)  
480 S. Batavia Street, Orange 92868 - RESERVATIONS: Call Monica Hunter 714-347-7900 or Julie  
Kramer 714-288-2470**

**04-04-12 Introduction/Quiz – Peter Kote  
04-11-12 Annuities & Mutual Funds –  
04-18-12 Financial Planning I –  
04-25-12 Financial Planning II –  
05-02-12 Long Term Care –  
05-09-12 Fixed Income Investing –  
05-16-12 Equity Investing –  
05-23-12 Investment Rules & Stock Market Contest –**

**Fullerton Senior Center – It's Your Estate (Wednesdays 2:00 to 3:30 PM) at St. Mary's Church 400  
W. Commonwealth Avenue, Fullerton RESERVATIONS – Call the center (714) 738-6305**

**4-04-12 Introduction & Quiz – Peter Kote  
04-11-12 Estate Planning Basics  
04-18-12 Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets  
04-25-12 Advanced Estate Planning  
05-02-12 Charitable Income & Tax Planning Issues – Carolyn Swanson & Amanda Ferrari  
05-09-12 IRA; 401K; 403B AND 457 Plans Distributions  
05-16-12 The Role of a Trustee & Executor-  
05-23-12 Case Study-Review –**

**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 (Moderated by: Richard Huntington)**

**04-05-12 Introduction & Quiz – Peter Kote  
04-12-12 Annuities & Mutual Funds –  
04-19-12 Financial Planning I –  
04-26-12 Financial Planning II –  
05-03-12 Long Term Care –  
05-10-12 Fixed Income Investing –  
05-17 Equity Investing –  
05-24-12 Investment Rules and Stock Market Contest –**

**Laguna Beach Senior Center – It's Your Money (Friday 1:30 PM – 3:00 PM)  
Community Conference Room, For RESERVATIONS – Please call the Laguna Beach Community  
Foundation 949-715-8223 or [info@lagunabeachcf.org](mailto:info@lagunabeachcf.org)**

**04-06-12 Introduction & Quiz – Peter Kote  
04-13-12 Annuities & Mutual Funds –  
04-20-12 Financial Planning I –  
04-27-12 Financial Planning II –  
05-04-12 Fixed Income Investing –  
05-11-12 Equity Investing –  
05-18-12 Long Term Care –  
05-25-12 Investment Rules & Stock Market Contest –**