



FEELinControl.org

24033 El Toro Road, Suite 130, Laguna Hills, CA 92653

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

Fall 2017 Workshop Series

Workshop community	Moderators	Contact
Orange County	Peter Kote Trevor Murphy Richard Huntington	pete@FEELinControl.org trevor@FEELinControl.org huntingtonjr@msn.com

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 Account Planning
Fixed Income Investing	7	The Trustee and Executor
The Big Takeaway	8	Case Study and Review

Charitable Sponsors: The American Cancer Society, American Heart Association, Chapman University, CHOC Children's Foundation, FEELinControl.org, Laguna Canyon Foundation, Orange Coast College Foundation, St. Jude Memorial Foundation, Susan G. Komen® Orange County and The Salvation Army.

City	Workshop	Venue	Day and Time
Newport Beach 949-548-2411	"It's Your Money!"	<u>Newport Beach Central Library</u> 1000 Avocado Street	Mondays, September 11 – October 30 10:00 AM to 11:30 AM
09-11-17	Introduction & Quiz		Peter Kote
09-18-17	Annuities & Mutual Funds		Peter Kote & Neal Rutter
09-25-17	Financial Planning I		Laura Tarbox
10-02-17	Financial Planning II		Laura Tarbox
10-09-17	Long Term Care		Kari Buist-Baker
10-16-17	Equity Investing		Mark Hebner
10-23-17	Fixed Income Investing		Kurt Beimfohr
10-30-17	The Big Take Away & Contest		Patrick Stark & John Prichard
11-06-17 6:30pm-8:30pm	Advanced Session - An Evidence-Based Approach to Investing		Mark Hebner & Peter Kote
Orange 714-288-2470	"It's Your Estate!"	<u>Orange Public Library</u> 407 East Chapman Avenue	Tuesdays, September 12 – October 31 9:30 AM to 11:00 AM
09-12-17	Introduction & Quiz		Peter Kote
09-19-17	Estate Planning Basics		Nicole Newman
09-26-17	Planning for Incapacity		Teresa Gorman
10-03-17	Living Trust & More		Renee Gabbard
10-10-17	Charitable Income & Tax Planning Issues		David Moore
10-17-17	Retirement Account Planning		Michael Simon
10-24-17	The Role of a Trustee & Executor		Peter Kote & Shelly O'Byrne
10-31-17	Case Study/Review		Peter Kote & Steve Bemis

Laguna Niguel 949-425-5151	"It's Your Estate!"	<u>Sea Country Center</u> 24602 Aliso Creek Road	Tuesdays, September 5 – October 24 1:00 PM to 2:30 PM
09-05-17	Introduction & Quiz		Richard Huntington
09-12-17	Estate Planning Basics		Jan Meyer
09-19-17	Planning for Incapacity		Stephanie Winstead
09-26-17	Living Trust & More		Max Alavi
10-03-17	Charitable Income & Tax Planning Issues		Bonnie Hayden
10-10-17	Retirement Account Planning		Thomas Welch
10-17-17	The Role of a Trustee & Executor		Richard Huntington/Karen Prinz
10-24-17	Case Study/Review		Richard Huntington/Timothy Pickart
Brea 714-990-7751	"It's Your Estate!"	<u>Brea Senior Center</u> 500 Sievers Avenue	Tuesdays, September 5 – October 24 1:30 PM to 3:00 PM
09-05-17	Introduction & Quiz		Trevor Murphy
09-12-17	Estate Planning Basics		Holly Nabiey
09-19-17	Planning for Incapacity		Nicole Newman
09-26-17	Living Trust & More		Shauna Anderson
10-03-17	Charitable Income & Tax Planning Issues		David Moore
10-10-17	Retirement Account Planning		Michael Simon
10-17-17	The Role of a Trustee & Executor		Trevor Murphy/Shelly O'Byrne
10-24-17	Case Study/Review		Trevor Murphy/Steve Bemis
New Location Irvine 949-724-7300	"It's Your Money!"	<u>Trabuco Center</u> 5701 Trabuco Road	Wednesdays, September 13 - November 1 1:00 PM to 2:30 PM
09-13-17	Introduction & Quiz		Trevor Murphy
09-20-17	Annuities & Mutual Funds		Neal Rutter
09-27-17	Financial Planning I		Laurie Dubchansky
10-04-17	Financial Planning II		Gina Chironis
10-11-17	Long Term Care		Kari Buist-Baker
10-18-17	Equity Investing		Gary Rennie
10-25-17	Fixed Income Investing		William Cuthbertson
11-01-17	The Big Take Away & Contest		Trevor Murphy/Carl Lachman
New Site Huntington Beach 714-536-5600	"It's Your Estate!"	<u>Senior Center in Central Park</u> 18041 Goldenwest St	Wednesdays, August 30 - October 25 2:00 PM to 3:30 PM
08-30-17	Introduction & Quiz		Peter Kote
09-13-17	Estate Planning Basics		Kara Rudin
09-20-17	Planning for Incapacity		Dennis Jensen
09-27-17	Living Trust & More		James Leese
10-04-17	Charitable Income & Tax Planning Issues		David Moore
10-11-17	NO CLASS		
10-18-17	Retirement Account Planning		Mark Prendergast
10-25-17	The Role of a Trustee & Executor		Peter Kote & Mark Powell

Fullerton 714-738-6305	“It’s Your Money!” <u>Fullerton Community Center</u> 340 W Commonwealth Avenue Grand Hall A/B	Thursdays, September 14 – November 2 2:00 PM to 3:30 PM
09-14-17 09-21-17 09-28-17 10-05-17 10-12-17 10-19-17 10-26-17 11-02-17	Introduction & Quiz Annuities & Mutual Funds Financial Planning I Financial Planning II Long Term Care Equity Investing Fixed Income Investing 3:00 – 4:30 Library Conference Room 353 W. Commonwealth Ave. The Big Take Away & Contest	Peter Kote Delia Fernandez Aimee Calderon Aimee Calderon Kari Buist-Baker Robert McDaniel Julie Bray Peter Kote & Carl Lachman
Mission Viejo 949-470-3062	“It’s Your Money!” <u>Norman P. Murray Senior Center</u> 24932 Veterans Way	Thursdays, September 7 – October 26 10:00 AM to 11:30 AM
09-07-17 09-14-17 09-21-17 09-28-17 10-05-17 10-12-17 10-19-17 10-26-17	Introduction & Quiz Annuities & Mutual Funds Financial Planning I Financial Planning II Long Term Care Equity Investing Fixed Income Investing The Big Take Away & Contest	Richard Huntington Richard Huntington/Neal Rutter Mark Wilson Mark Wilson Kari Buist-Baker Angie Grillo Jeremy Portnoff Meghan Coolbaugh/Neal Rutter
Costa Mesa 714-432-5707	“It’s Your Money!” <u>Orange Coast College</u> 2701 Fairview Road Student Center Classroom Use Staff Parking Lot B for free parking	Fridays, September 22 – November 17 10:00 AM to 11:30 AM
09-22-17 09-29-17 10-06-17 10-13-17 10-20-17 10-27-17 11-03-17 11-10-17 11-17-17	Introduction & Quiz Annuities & Mutual Funds Financial Planning I Financial Planning II Long Term Care Equity Investing Fixed Income Investing NO CLASS The Big Take Away & Contest	Trevor Murphy Peter Kote Marty McNamara Patrick Chu Kari Buist-Baker Matthew Pixa William Cuthbertson Trevor Murphy & Carl Lachman
Laguna Beach 949-715-8105	“It’s Your Estate!” <u>Laguna Beach Senior Center</u> 380 Third Street	Fridays, September 8 – October 27 1:30 PM to 3:00 PM
09-08-17 09-15-17 09-22-17 09-29-17 10-06-17 10-13-17 10-20-17 10-27-17	Introduction & Quiz Estate Planning Basics Planning for Incapacity Living Trust & More Charitable Income & Tax Planning Issues Retirement Account Planning The Role of a Trustee & Executor Case Study/Review	Peter Kote Nicole Anderson Peter McMahan Leslie Daff David Moore Michael Simon Peter Kote & Karen Prinz Peter Kote & Mark Powell

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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, 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 plus 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. 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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