

# Bringing Financial Literacy to the Library

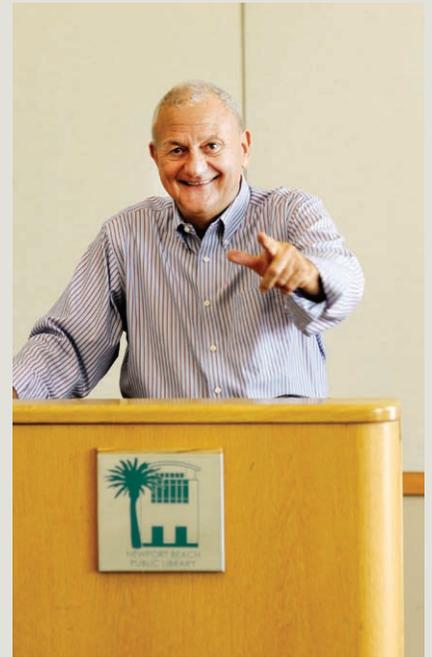
Financial literacy is critical in today's world. How does one live well now, provide for loved ones and leave a legacy? For more than seven years, the Library Foundation has offered the ***It's Your Money*** and ***It's Your Estate*** workshops to provide a safe space to receive invaluable information about all aspects of estate planning.

Peter C. Kote has been moderating these informative workshops for the Library Foundation since 2004 on a volunteer basis.

Peter explains, "We made some rules for the program that we still hold to today: No commercial sponsorship of the series, speakers would not collect contact information, and there would be no soliciting for a donation. Our goal was pure education with a bias towards encouraging folks to consider a charity in their estate plans. The motivation for the ***It's Your Estate*** series was my father's death. His last 30 days were spent at the hospital with an endotracheal tube down his throat until he could no longer speak or gesture. Our family had never discussed end of life issues and we had no legal documents."

Pete says, "The program is so satisfying to me when I read the positive evaluations from those who have attended, saying they will start the family conversation about money, investing, death and living."

Please see the Calendar page for new dates beginning in September.



## Testimonials from Workshop Attendees



**Bill and Carol Pfeifer** spoke about when their parents were approaching their end of life. Money and finances were the last thing on their minds, so they just let it go. After attending the workshops at the library, they made it a priority to get serious about their estate planning,

They mentioned that they loved Pete's style from the first session and they were hooked for the entire series. They appreciated his no-nonsense take on understanding estate taxes and the financial services industry.



**Jill Robbins** said she first learned about the workshop from the *Bookmark* and thought it was something new worth looking into. She insisted that Pete's experience, individual style and integrity was obvious right off the start. She felt each session had at least one major eye-opener that she had never thought about before.



**Diane Buchanan** also learned about the workshop from the *Bookmark* and enjoyed not only Pete's unique perspective and teaching style, but also the changing roster of guest speakers. She said it was very motivating and conveyed complex information clearly.

For more information about these workshops or planned giving, please phone Tracy Keys at 949.717.3890.