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 Plan Distributions
Fixed Income Investing	**7**	The Trustee and Executor
The Big Takeaway	**8**	Case Study and Review

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

City	Workshop	Venue	Day and Time
Newport Beach 949-548-2411	"It's Your Money!"	Newport Beach Central Library 1000 Avocado Street	Mondays, September 11 – October 30 10:00 AM to 11:30 AM
09-11-17	Introduction & Quiz		
09-18-17	Annuities & Mutual Funds		
09-25-17	Financial Planning I		
10-02-17	Financial Planning II		
10-09-17	Long Term Care		
10-16-17	Equity Investing		
10-23-17	Fixed Income Investing		
10-30-17	The Big Take Away & Contest		
Orange 714-288-2470	"It's Your Estate!"	Orange Public Library 407 East Chapman Avenue	Tuesdays, September 12 – October 31 9:30 AM to 11:00 AM
09-12-17	Introduction & Quiz		
09-19-17	Estate Planning Basics		
09-26-17	AHCD, Power of Attorney, Conservator		
10-03-17	Living Trust & More		
10-10-17	Charitable Income & Tax Planning Issues		
10-17-17	IRA & Retirement Plan Distributions		
10-24-17	The Role of a Trustee & Executor		
10-31-17	Case Study/Review		

Laguna Niguel 949-425-5151	"It's Your Estate!"	Sea Country Center 24602 Aliso Creek Road	Tuesdays, September 5 – October 24 1:00 PM to 2:30 PM
09-05-17	Introduction & Quiz		
09-12-17	Estate Planning Basics		
09-19-17	AHCD, Power of Attorney, Conservator		
09-26-17	Living Trust & More		
10-03-17	Charitable Income & Tax Planning Issues		
10-10-17	IRA & Retirement Plan Distributions		
10-17-17	The Role of a Trustee & Executor		
10-24-17	Case Study/Review		
Brea 714-990-7751	"It's Your Estate!"	Brea Senior Center 500 Sievers Avenue	Tuesdays, September 5 – October 24 1:30 PM to 3:00 PM
09-05-17	Introduction & Quiz		
09-12-17	Estate Planning Basics		
09-19-17	AHCD, Power of Attorney, Conservator		
09-26-17	Living Trust & More		
10-03-17	Charitable Income & Tax Planning Issues		
10-10-17	IRA & Retirement Plan Distributions		
10-17-17	The Role of a Trustee & Executor		
10-24-17	Case Study/Review		
New Location **Irvine** 949-724-7300	"It's Your Money!"	Trabuco Center 5701 Trabuco Road	Wednesdays, September 13 - November 1 1:00 PM to 2:30 PM
09-13-17	Introduction & Quiz		
09-20-17	Annuities & Mutual Funds		
09-27-17	Financial Planning I		
10-04-17	Financial Planning II		
10-11-17	Long Term Care		
10-18-17	Equity Investing		
10-25-17	Fixed Income Investing		
11-01-17	The Big Take Away & Contest		
New Site **Huntington Beach** 714-536-5600	"It's Your Estate!"	City Senior Central Park 18041 Goldenwest St	Wednesdays, August 30 - October 25 2:00 PM to 3:30 PM
08-30-17	Introduction & Quiz		
09-13-17	Estate Planning Basics		
09-20-17	AHCD, Power of Attorney, Conservator		
09-27-17	Living Trust & More		
10-04-17	Charitable Income & Tax Planning Issues		
10-11-17	NO CLASS		
10-18-17	IRA & Retirement Plan Distributions		
10-25-17	The Role of a Trustee & Executor		

Fullerton 714-738-6305	"It's Your Money!"	Fullerton Community Center 340 W Commonwealth Avenue Grand Hall A/B	Thursdays, September 14 – November 2 2:00 PM to 3:30 PM

09-14-17	Introduction & Quiz
09-21-17	Annuities & Mutual Funds
09-28-17	Financial Planning I
10-05-17	Financial Planning II
10-12-17	Long Term Care
10-19-17	**Equity Investing** **353 W. Commonwealth Ave**
10-26-17	Fixed Income Investing
11-02-17	The Big Take Away & Contest

Mission Viejo 949-470-3062	"It's Your Money!"	Norman P. Murray Senior Center 24932 Veterans Way	Thursdays, September 7 – October 26 10:00 AM to 11:30 AM

09-07-17	Introduction & Quiz
09-14-17	Annuities & Mutual Funds
09-21-17	Financial Planning I
09-28-17	Financial Planning II
10-05-17	Long Term Care
10-12-17	Equity Investing
10-19-17	Fixed Income Investing
10-26-17	The Big Take Away & Contest

Costa Mesa 714-432-5707	"It's Your Money!"	Orange Coast Community College Student Union Center 2701 Fairview Road	Fridays, September 08 – November 3 10:00 AM to 11:30 AM

09-08-17	Introduction & Quiz
09-15-17	Annuities & Mutual Funds
09-22-17	Financial Planning I
09-29-17	Financial Planning II
10-06-17	Long Term Care
10-13-17	Equity Investing
10-20-17	Fixed Income Investing
10-27-17	NO CLASS
11-03-17	The Big Take Away & Contest

Laguna Beach 949-715-8105	"It's Your Estate!"	Laguna Beach Senior Center 380 Third Street	Fridays, September 8 – October 27 1:30 PM to 3:00 PM

09-08-17	Introduction & Quiz
09-15-17	Estate Planning Basics
09-22-17	AHCD, Power of Attorney, Conservator
09-29-17	Living Trust & More
10-06-17	Charitable Income & Tax Planning Issues
10-13-17	IRA & Retirement Plan Distributions
10-20-17	The Role of a Trustee & Executor
10-27-17	Case Study/Review

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 contract Trevor Murphy, President & CEO of Financial & Estate Literacy or feelincontrol.org

Email: trevor@feelincontrol.org or telephone (949) 463-1507