

# **IT'S YOUR MONEY/ESTATE WORKSHOPS**

## **Fall 2005**

**No commercial or for-profit sponsors are allowed and therefore no speaker will receive an attendees name, address or phone number; no financial or insurance product will be sold and no charity will solicit you for a donation. The purpose of the program is to be educated in the consumer financial arena to take charge of your money and estate.**

### **CHARITABLE SPONSORS:**

**American Heart Association  
Laguna Canyon Foundation  
Orange County Community Foundation  
Laguna Playhouse  
Arthritis Foundation  
Orange County Child Abuse Prevention Center.**

#### **Mission Viejo Senior Center – It's Your Money (Mondays 1:00 to 2:30 PM)**

Norman P. Murray Community & Senior Center  
4932 Veterans Way, Mission Viejo  
RESERVATIONS – Call the Senior Center: (949) 470-3062

- 9/12 Introduction/Quiz – Peter Kote & Gary Miller**
- 9/19 Financial Planning, Part 1 – Crystal Madrid**
- 9/26 Financial Planning, Part 2 – Crystal Madrid**
- 10/3 Annuities, Mutual Funds – Peter Kote**
- 10/10 Long Term Care Insurance – Julie Schoen**
- 10/17 Fixed Income Investing – Scott Walker**
- 10/24 Taxes – Cheryl J. Schaffer**
- 10/31 Investment Rules and Stock Market – Peter Kote & Gary Miller**

#### **Newport Beach Library – It's Your Money (Tuesdays 10 to 11:30 AM)**

Newport Beach Central Library, Friends Community Room,  
1000 Avocado, Newport Beach  
RESERVATIONS – Tracy Keys at the Newport Beach Library Foundation: (949) 717-3890

- 9/27 Introduction/Quiz – Peter Kote & John Pritchard**
- 10/4 Financial Planning, Part 1 – Richard Crum & Mark K. Rylance**
- 10/11 Financial Planning, Part 2 – Richard Crum & Mark K. Rylance**
- 10/18 Annuities, Mutual Funds – Peter Kote**
- 10/25 Long Term Care Insurance – Julie Schoen**
- 11/1 Fixed Income Investing – Jason Sherr**
- 11/8 Taxes – Scott Burack**
- 11/15 Investment Rules and Stock Market – Peter Kote & John Pritchard**

## **Laguna Hills Florence Sylvester Senior Center – It's Your Estate (Tuesdays 2:30 to 4 PM)**

Florence Sylvester Senior Center

23721 Moulton Pkwy

Laguna Hills, CA 92653

RESERVATIONS: Call Guine at (949) 497-8324

- 9/13 Introduction/Quiz – Peter Kote
- 9/20 Wealth Preservation – David Duttonhofer
- 9/27 Estate Planning Basics – Teresa Gorman
- 10/4 Advanced Health Care Directive; Conservatorships  
& Power of Attorney Over Assets – Kim Hubbard
- 10/11 Advanced Estate Planning – James Leese
- 10/18 Charitable Income & Tax Planning Issues – Steve Marken
- 10/25 Being a Trustee and Executor – Peter Kote & Robert Kacer
- 11/1 Case Study/Review – Peter Kote

## **Huntington Beach – It's Your Estate (Wednesday 1 PM to 2:30 PM)**

Adult Day Services of Orange County – Conference room upstairs

9451 Indianapolis Ave

Huntington Beach, CA 92646

RESERVATIONS – Call the center for directions and reservations (714) 593-9630

- 9/21 Introduction/Quiz – Peter Kote
- 9/28 Wealth Preservation – Linda Barlow
- 10/5 Estate Planning Basics – John Trommald
- 10/12 Advanced Health Care Directive; Conservatorships  
& Power of Attorney Over Assets – Kim Hubbard
- 10/19 Advanced Estate Planning – Jessica Dorman-Davis
- 10/26 Charitable Income & Tax Planning Issues – Steve Marken
- 11/2 Being a Trustee and Executor – Peter Kote & Robert Kacer
- 11/9 Case Study/Review – Peter Kote

## **Fullerton Senior Center – It's Your Money (Thursday 2:00 to 3:30 PM)**

Fullerton Multi-Service Center

340 W. Commonwealth Ave, Fullerton

RESERVATIONS – Call the center at (714) 738-6305

- 9/1 Introduction/Quiz – Peter Kote
- 9/8 Annuities, Mutual Funds – Peter Kote
- 9/15 Financial Planning, Part 1 – George D. McDaniel
- 9/22 Financial Planning, Part 2 – George D. McDaniel
- 9/29 Long Term Care Insurance – Julie Schoen
- 10/6 Fixed Income Investing – Scott Walker
- 10/13 Taxes – Jerry Kaplan
- 10/20 Investment Rules and Stock Market – Peter Kote

## **Laguna Beach – It's Your Money (Fridays at 10:00 to 11:30 AM)**

Assistance League in Laguna Beach

547 Catalina Street

Reservation – Guine at (949) 497-8324

- 9/16 Introduction/Quiz – Peter Kote & David Duttonhofer

- 9/23 Financial Planning, Part 1 – Laura Tarbox**
- 9/30 Financial Planning, Part 2 – Laura Tarbox**
- 10/7 Annuities, Mutual Funds – Peter Kote**
- 10/14 Long Term Care Insurance – Julie Schoen**
- 10/21 Fixed Income Investing – Scott Walker**
- 10/28 Taxes – Brian Brelje**
- 11/4 Investment Rules and Stock Market – Peter Kote & David Dutenhofer**

### **Laguna Niguel Senior Center – It’s Your Money (Fridays at 1:00 to 2:30 PM)**

Sea Country Senior Center

24602 Aliso Creek Road, Laguna Niguel

RESERVATIONS – Call the Senior Center for reservations/directions: (949) 425-5151

- 9/9 Introduction/Quiz – Peter Kote & Gary Miller**
- 9/16 Financial Planning, Part 1 – Scott Dauenhauer**
- 9/23 Financial Planning, Part 2 – Scott Dauenhauer**
- 9/30 Annuities, Mutual Funds – Peter Kote**
- 10/7 Long Term Care Insurance – Julie Schoen**
- 10/14 Fixed Income Investing – Scott Walker**
- 10/21 Taxes – Rick McCarthy**
- 10/28 Investment Rules and Stock Market – Peter Kote & Gary Miller**

### **Seal Beach, Leisure World – Clubhouse 4**

10-week program – register through Tom Pontac – (562) 430-5777

Program starts September 14 from 1:00 PM to 2:30 PM and ends on November 16, **every Wednesday**

Program title “ Your Financial Health”