

Finance & Estate Literacy

It's Your Money and It's Your Estate Fall 2020 Virtual Seminars

For many years, we have offered these two series in person throughout Orange County. Given the Covid-19 situation, we feel that in-person meetings are not an option. In the Spring of 2020 we did a Money series through the Laguna Beach Seniors at the SusiQ and it was well attended and well received.

Given the success of the Spring series, it was decided that both It's Your Money and It's Your Estate will each be offered through Zoom Webinar seminars for the Fall. You can register for one or both of the series. And you when you register, you can attend any or all of the sessions for that series. As always, there is no cost to attend these sessions.

It's Your Money will be presented on Tuesdays at 1:30 in the afternoon. It's Your Estate will be presented on Wednesdays also at 1:30. The dates for each session are shown below.

It's Your Money		It's Your Estate	
22-Sep	Money Test & Tax Update	23-Sep	Estate Test & Tax Update
29-Sep	Annuities & Mutual Funds	30-Sep	Estate Planning Basics
6-Oct	Financial Planning I: Goals & Your Assets	7-Oct	Planning for Incapacity
13-Oct	Financial Planning II: Investing Your Money	14-Oct	Living Trusts
20-Oct	Medical Care Planning: Caregiver & Insurance	21-Oct	Charitable Giving
27-Oct	Equity Investing: A Better Approach	28-Oct	Retirement Account Planning
3-Nov	Fixed Income Investing: How to Use Bonds	4-Nov	Trustee and Executor Duties
10-Nov	It's Your Money and Your Mind	11-Nov	Case Study and Review

We plan to have an "Orientation" Zoom Meeting the mornings of September 22nd and 23rd at 10:30. This is to help you feel comfortable attending a Zoom Webinar before we go live. The links for these sessions will be included with your confirmation. Also, if you are new to Zoom, we will provide a link so you can download a getting started handbook for this series. This will walk you through how to connect to Zoom.

The weekly "handout" material will be available at materials.itsyourmoneyandestate.org. Look at the Fall 2020 series tab to get the weekly material.

Please try not to share your series links with anyone else. The link is for you. No problem if it is within your family, but otherwise feel free to send others this invitation and they can register themselves.

Here are the two series' links:

It's Your Money https://us02web.zoom.us/webinar/register/WN_s4QQzdeWRI-ha-_UuGV1ug

It's Your Estate https://us02web.zoom.us/webinar/register/WN_BwcVdK_yRci2AycmP8apiw

When you go to register, please make sure you scroll to the bottom of the form, it may ask if you are a robot. Click that you are not a robot, if asked, and then click REGISTER.

We look forward to having you virtually attend as many of these sessions as possible.

Pete Kote and the team at It's Your Money and Estate.