

## OUR MISSION

— To promote self-awareness of our own financial and estate plans, provide practical suggestions on how to find competent and ethical advisors, and to encourage tax-wise charitable giving —

## CHARITABLE SPONSORS

Laguna Beach Seniors, Laguna Beach Community Foundation, Mission Hospital Foundation, Ocean Institute, Laguna Canyon Foundation, American Heart Association, Orange County Community Foundation, KOCE-TV, Arthritis Foundation, Chapman University, Great Park Conservancy and St. Joseph Hospital Foundation

- WORKSHOPS ARE FREE
- NO FINANCIAL PRODUCTS WILL BE SOLD
- NO PROFESSIONAL WILL RECEIVE YOUR MAILING ADDRESS OR PHONE NUMBER
- NO CHARITY WILL SOLICIT A DONATION

## ***“IT’S YOUR ESTATE”***

**GIVING YOU THE KNOWLEDGE TO  
BE IN CONTROL OF YOUR ESTATE**

**LAGUNA BEACH COMMUNITY CENTER**

**WHEN:** *FRIDAYS 1:30 – 3:00 P.M.*

**WHERE:** 380 THIRD STREET – THE COMMUNITY ROOM

**RESERVATIONS:** [info@lagunabeachcf.org](mailto:info@lagunabeachcf.org) or 949.315-9261

09-10-10 Introduction/Quiz - Peter Kote

09-17-10 Estate Planning Basics – Nicole Anderson

09-24-10 Advanced Health Care Directives; Conservatorship and Power of Attorney over Assets – Keith Wisbaum

10-01-10 Advanced Estate Planning – Leslie Daff

10-08-10 Charitable Income and Tax Planning Issues – Roland Ho, Jeff Swanson and Amanda Ferrari

10-15-10 IRA; 401k; 403b and 457 Plans Distributions – Mark Powell

10-22-10 The Role of a Trustee and Executor - Peter Kote and Gary Van Arnan

10-29-10 Case Study/Review - Peter Kote