

Laguna Beach Community Foundation cordially invites you to a **FREE** 8-week workshop series featuring 12 hours of objective education about **Your Estate Plan**.

- NO LIVING TRUST PRODUCTS OR INSURANCE WILL BE SOLD.
- NO PROFESSIONAL ADVISOR WILL RECEIVE YOUR MAILING ADDRESS OR PHONE NUMBER.
- NO CHARITY WILL SOLICIT A DONATION.

## “IT'S YOUR ESTATE”

- What is the very first question you should ask your advisor?
- How should you allocate your investment assets to preserve your wealth?
- What are the disadvantages of a living trust?
- What are the practical low cost ways to avoid probate?
- Why you may not want to avoid probate?
- How much income tax is your estate going to pay?
- For a Charitable Trust – do you really need a charity?
- What is the most important legal document you need (less than \$5.00)?

Peter C. Kote will moderate the Workshops. He does not sell insurance, financial products or living trusts. Peter is a private fiduciary, and if you have a question you can contact him through his web site at [www.trusteepro.com](http://www.trusteepro.com)

**When – Friday 1:30 PM – 3:00 PM**

**Where – Laguna Beach Community & Susi Q Senior Center;  
in the Community Room**

**RESERVATIONS - Call**

**Laguna Beach Community Foundation at 949-715-8223**

09-09-11	Introduction/Quiz - Peter Kote
09-16-11	Estate Planning Basics – Hugh Sanders
09-23-11	Advanced Health Care Directive; Conservatorship & Power of Attorney over Assets – Teresa Gorman
09-30-11	Advanced Estate Planning – Leslie Daff
10-07-11	Charitable Income & Tax Planning Issues – Jim Frey
10-14-11	IRA; 401k; 403b and 457 Plans Distributions – Timothy Pickard
10-21-11	The Role of a Trustee & Executor – Peter Kote & Ken Petersen
10-28-11	Case Study/Review - Peter Kote