



Sponsored by the Orange Public Library Foundation

IT'S YOUR MONEY

Workshops on Tuesday's at 1:30

- 9/22 Money Test & Tax Update
- 9/29 Annuities & Mutual Funds
- 10/06 Financial Planning: Goals and Your Assets
- 10/13 Financial Planning II: Investing Your Money
- 10/20 Medical Care Planning: Caregiver & Insurance
- 10/27 Equity Investing: Better Approach
- 11/03 Fixed Income Investing: How to Use
- 11/10 It's Your Money and Your Mind

IT'S YOUR ESTATE

Workshops on Wednesday's at 1:30

- 9/23 Estate Test & Tax Update
- 9/30 Estate Planning Basics
- 10/07 Planning for Incapacity
- 10/14 Living Trusts
- 10/21 Charitable Giving
- 10/28 Retirement Account Planning
- 11/04 Trustee and Executor Duties
- 11/11 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_s4QzdeWRI-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 and put in that you are with the Orange Public Library Foundation. It may ask if you are a robot. Click that you are not a robot, if asked, and then click REGISTER.

City of Orange

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