

"IT'S YOUR MONEY"

WORKSHOP SERIES

Sponsored by Orange Public Library Foundation

WHEN: Fridays, April 3 - May 22, 2020

WHERE: Orange Public Library, 407 E. Chapman Avenue, Orange CA 92866

TIME: 9:30 a.m. – 11:00 a.m.

COST: FREE to all attendees; Registration is advised, space is limited.

PLEASE MAKE YOUR RESERVATION:

Call the Orange Public Library Foundation at (714) 288-2470
or email OPLibraryFoundation@gmail.com

WORKSHOP DATES AND CONTENT

Friday, 4/03	New Tax Law
Friday, 4/10	Sales Game
Friday, 4/17	Financial Planning I
Friday, 4/24	Financial Planning II
Friday, 5/01	Medical Care Planning
Friday, 5/08	Fixed Income Investing
Friday, 5/15	Equity Investing
Friday, 5/22	The Big Take Away (Contest)



"These seminars are so very informative. They stimulated us to get our trust in order and also encouraged us to talk to our children about End of Life wishes." – Glenn and Jan Stocking

NO financial products will be sold, and NO charitable gifts will be solicited.

Samples of what you will learn:

- What is the very first question you should ask your advisor?
- Learn the difference between an annuity, variable annuity and a mutual fund including fees, commissions and expenses.
- What factors should you consider with long-term care insurance?
- What is the difference between an asset manager, financial planner, stockbroker, banker and insurance agent?
- Learn to identify your advisor's potential "conflicts of interest."

City of Orange

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