

Financial health is equally important to our wellness as mental, emotional, and spiritual health. But let's be honest, having the discussion surrounding trusts and wills is complicated and may be intimidating.

New Directions for Women is hosting a free educational 5-part estate planning workshop for our supporters and the community at large. Each workshop will begin at 8:00am and conclude no later than 9:30am.

Structured to provide you with a comprehensive overview of the most common estate planning techniques, tools and assets, this workshop series will provide you with a unique opportunity to interact with professionals from the community in a safe learning environment.

Topics will cover everything from estate planning basics to advanced healthcare directives to charitable income and tax planning and more. Questions are encouraged during and after each workshop.

Space is limited! Please RSVP or direct any questions to Tania Bhattacharyya, Foundation Executive Director, at 949.313.1192 ext. 300 or email tania@newdirectionsforwomen.org.

New Directions for Women is committed to providing you with a safe learning environment. Consequently, presenters will not be allowed to contact any of the attendees unless specifically requested by the attendee. Furthermore, attendee lists will not be shared with any of the presenters.



NEW DIRECTIONS
FOR WOMEN

FREE COMMUNITY WORKSHOP

SHAPING YOUR FUTURE THROUGH ESTATE PLANNING



TO GIVE YOU THE MOST COMPREHENSIVE PICTURE POSSIBLE, IT IS ADVISABLE TO ATTEND ALL FIVE WORKSHOPS IN THIS SERIES.

- **SESSION ONE: FEBRUARY 20, 2019
ESTATE PLANNING BASICS, PART I**
- **SESSION TWO: FEBRUARY 27, 2019
ESTATE PLANNING BASICS, PART II**
- **SESSION THREE: MARCH 6, 2019
INCOME & ESTATE TAX PLANNING**
- **SESSION FOUR: MARCH 13, 2019
LEVERAGING CHARITY EXEMPTIONS**
- **SESSION FIVE: MARCH 20, 2019
QUICK REVIEW AND PANEL Q&A**

**WORKSHOPS WILL BE HELD AT 3001 REDHILL AVENUE,
BUILDING 4, SUITE 109, COSTA MESA CA 92626
REGISTRATION & BREAKFAST START: 7:45 AM
WORKSHOP START: 8:00AM ENDS PROMPTLY AT 9:30AM**