

Join us regularly to improve your homeownership and wealth-building journey at our onsite classroom featuring free workshops taught by local experts.

MAY
27

12:00 pm to 1:00 pm

Rightsizing in Retirement: Stay Put, or Make the Move?

Join us to evaluate the pros and cons of staying in your current home versus transitioning to a new space. Whether you're considering aging in place or exploring retirement communities and senior living options, this seminar will provide the insights you need to make an informed decision that aligns with your goals.

PRESENTED BY: ANDRIANA MENDEZ, CO-OWNER OF CUSTOM MOVING SOLUTIONS

MAY
29

5:30 pm to 6:30 pm

The Sandwich Generation: When Caring for Aging Parents Becomes Too Much

Join us as we discuss common concerns adult children have about their parents and how updating their home, bringing in care help, or lastly, putting it on the market to pay for their Assisted Living comes into play.

PRESENTED BY: ANDRIANA MENDEZ, CO-OWNER OF CUSTOM MOVING SOLUTIONS

JUNE
05

11:00 am to 12:00 pm

Funeral Planning: Prepare, Protect and Empowering You

Join me on helping you understand what goes into planning your celebration of life. You'll have the knowledge to make informed decisions without emotional overspending that can lead to future regrets.

PRESENTED BY: JACQUELINE SCOGGINS, SERENITY FUNERAL PLANNING CONSULTANTS

JUNE
14

11:00 am to 12:00 pm

Social Security: Understanding and Optimizing Social Security Benefits

Understand and navigate the processes of Social Security and Medicare benefits in our changing landscape.

PRESENTED BY: ELAINE WONG

JUNE
21

11:00 am to 12:00 pm

Life Insurance: Protecting Assets From the Unexpected

Learn the importance of insurance planning and home acquisition. Also learn how mortality or unexpected accidents impact everyone's finances.

PRESENTED BY: ADOLFO ANGELES

JUNE
24

11:00 am to 12:00 pm

Medicare: Budgeting for Healthcare cost in Retirement

Understand and navigate the processes of Social Security and Medicare benefits in our changing landscape.

PRESENTED BY: ELAINE WONG

JULY 11 5:00 pm to 7:00 pm
Peace of Mind: Planning For the Road Ahead
The importance of long term care insurance and planning, preparing your wishes in advance and avoid emotional spending, understanding long term care and finances, guidance through the placement process.
PRESENTED BY: JOCELYNN JASPER, WANDAH PARENTI, ADOLFO ANGELES, JACQUELINE SCOGGINS

JULY 12 11:00 am to 12:00 pm
Home Solar 101
Learn the details on Solar power generation for your home, including solar contracts and savings generated.
PRESENTED BY: SONNY SALCEDO

JULY 17 11:00 am to 12:00 pm
Life Insurance: Protecting Assets From the Unexpected
Learn the importance of insurance planning and home acquisition. Also learn how mortality or unexpected accidents impact everyone's finances.
PRESENTED BY: ADOLFO ANGELES

JULY 17 12:00 pm to 1:00 pm
Funeral Planning: Prepare, Protect and Empowering You
Join me on helping you understand what goes into planning your celebration of life. You'll have the knowledge to make informed decisions without emotional overspending that can lead to future regrets.
PRESENTED BY: JACQUELINE SCOGGINS, SERENITY FUNERAL PLANNING CONSULTANTS

JULY 17 6:00 pm to 8:00 pm
Social Mixer
Join the speakers, network, and community for an evening of social gatherings!
PRESENTED BY: JOCELYNN JASPER

JULY 22 5:00 pm to 6:00 pm
Social Security: Understanding and Optimizing Social Security Benefits
Understand and navigate the processes of Social Security and Medicare benefits in our changing landscape.
PRESENTED BY: ELAINE WONG

JULY 24 5:30 pm to 6:30 pm
Rightsizing in Retirement: Stay Put, or Make the Move?
Join us to evaluate the pros and cons of staying in your current home versus transitioning to a new space. Whether you're considering aging in place or exploring retirement communities and senior living options, this seminar will provide the insights you need to make an informed decision that aligns with your goals.
PRESENTED BY: ANDRIANA MENDEZ, CO-OWNER OF CUSTOM MOVING SOLUTIONS

JULY 1:00 pm to 2:00 pm

26

Estate Planning 101

A comprehensive primer on developing your Family Living Trust and Will. Avoid costly probate and learn the details on the creation of a bullet-proof estate plan.

PRESENTED BY: PATRICK ELAHMADIE, OWNER AT THE LAW OFFICE OF PATRICK ELAHMADIE

JULY 5:00 pm to 6:00 pm

29

Medicare: Budgeting for Healthcare cost in Retirement

Understand and navigate the processes of Social Security and Medicare benefits in our changing landscape.

PRESENTED BY: ELAINE WONG

JULY 5:00 pm to 6:00 pm

31

5 most Important Mistakes to Avoid on 1031 Exchanges

Learn the top 5 mistakes that clients need to avoid when navigating a 1031 tax-deferred exchange on real estate. Don't miss this dynamic expert presentation!

PRESENTED BY: JAMES CALLEJAS

AUG 11:00 am to 12:00 pm

02

Power Moves: Transform Your Home with EV Technology

How can updating your home to accommodate Electric Vehicles and other technologies transform your home and its value? Attend for the very latest on EV Trends and Homeownership.

PRESENTED BY: FRANK LEE, REALTOR® WITH BERKSHIRE HATHAWAY HOME SERVICES

AUG 11:00 am to 12:00 pm

30

For Retirees: When Should I Take Social Security Benefits?

The timing of when you start to take Social Security benefits can make a huge difference in terms of the amount you receive each month. Learn how to plan well for this important milestone.

PRESENTED BY: KINLEY WONG, BRIDGE FINANCIAL SERVICES

SEPT 10:00 am to 12:00 pm

20

For Retirees: When Should I Take Social Security Benefits?

The timing of when you start to take Social Security benefits can make a huge difference in terms of the amount you receive each month. Learn how to plan well for this important milestone.

PRESENTED BY: KINLEY WONG, BRIDGE FINANCIAL SERVICES