

The Monterey Public Library  
Endowment Committee and  
Friends of the Library  
in Partnership with The Financial  
Awareness Foundation present

## A SPECIAL GIFT TO THE COMMUNITY

Supporting the Financial Awareness  
and Financial Literacy Movement

*October is National Estate Planning Month*

### Building Blocks to Successful Financial Planning

#### Part 1: Getting Organized

Wednesday, October 4 • 6:00–8:00pm

### Building Blocks to Successful Financial Planning

#### Part 2: Essential Principles

Wednesday, October 11 • 6:00–8:00pm

### Building Blocks to Successful Estate Planning

Wednesday, October 18 • 6:00–8:00pm

*Monterey Public Library Community Room*

Adults are invited to attend.  
Admission is free. Reservations required.  
Hors d'oeuvres will be served.

Call (831) 646-5632 or  
email [thongchu@monterey.org](mailto:thongchu@monterey.org)



## PLANNING for the FUTURE

We want to motivate, educate, and empower you to improve your future financial lifestyle by providing you with the essential principles to smart personal financial management, common financial mistakes to avoid, and an easy-to-use, systematic approach to personal financial management.

## Expert Speakers



Cristofer A. Cabanillas  
AIF, CFP®  
Partner, Monterey  
Private Wealth



Julie King, Esq.  
Pierce King, P.C.  
A Professional  
Law Corp.



Laura A. Davis, Esq.  
Law Offices of  
Laura A. Davis



Kevin R. Mahoney  
CFP®  
Partner  
Integrus Wealth  
Management, LLC



Bryce Hamilton  
Partner & Co-Founder  
Vestus Group Wealth  
Management



Kris Toscano  
CPA  
Partner  
Hayashi Wayland



Liza D. Horvath  
CTFA, AIF  
President & CEO  
Monterey Trust  
Management



Mark Williams  
Managing Partner &  
Co-Founder  
Vestus Group Wealth  
Management

All attendees will receive a complimentary set of personal finance publications. This powerful resource gives you and your loved ones the 'gift of personal financial knowledge' to help make your dreams a reality.