



2019 Free Workshop Schedule—Winter/Spring

Workshops start at 6:00 p.m. and are held at the East Bend Conference Room *except where noted differently*. Call (541) 382-1795, email info@midoregon.com, or visit the Financial Workshops page at www.midoregon.com to reserve your seat. Refreshments will be served.

- January 29
Tuesday
Estate Planning Essentials *All new for 2019!
Special Guest Presenter Jeff Patterson of Schwabe, Williamson and Wyatt will cover wills, trusts, powers of attorney, healthcare documents, and beneficiary designation assets/accounts. He'll also cover questions about what happens when someone becomes disabled/incapacitated and how the Oregon and federal estate tax laws can affect one's estate and estate-planning considerations.
- February 26
Tuesday
Buying A Home in Today's Economy
This workshop is perfect for anyone thinking of buying their first—or next—home in the coming year. Presenter Kevin Tucker (NMLS 881486) of Arbor Mortgage will cover the basics of qualifying for a home loan, how to manage any credit issues, types of loans available, and even zero-down loan options. (Arbor Mortgage Group, NMLS #91027)
- March 12
Tuesday
Build a Basic Budget: The Five-Step Spending Plan
Wondering where your money goes? You're not alone. Join Mid Oregon's Catherine Christie as she helps you to develop a personal spending plan—not just a budget—that you can live with. Regain control and achieve your financial goals!
- March 19
Tuesday
How to Weather A Bear Market
This is a brand new workshop—stay tuned for a complete description soon!
Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. CBSI is under contract with the financial institution to make securities available to members. **Not NCUA/NCUSIF/FDIC insured, May Lose Value, No Financial Institution Guarantee. Not a deposit of any financial institution.** CUNA Brokerage Services, Inc. is a registered broker/dealer in all fifty states of the USA. <<Update Code once approved here>>
- March 28
Thursday
Organize Your Financial Records
Learn tips for getting and staying organized! Determine what documents to keep and how long to keep them, what to shred, and the best way to store various kinds of records. You'll also discover some helpful organizing tools. Presented by Riki Strong, Mid Oregon HR/Training Coordinator.
- April 11
Thursday
Understanding the ABCs (and Ds) of Medicare
Do you wonder what the difference is between Medicare Part A, Part B, Part C, and Part D? We invite you to learn more about who is eligible for Medicare, what is covered, what is not covered, and the enrollment timelines. We will also explore the differences between Medigap plans and Medicare Advantage plans. Presented by Emily Carrick, Medicare Sales Executive at PacificSource. *This workshop is provided for educational purposes only and is not a sales presentation.*