The Law Firm of
KAVESH
MINOR &
OTIS, INC

Estate Planning Specialists
for your peace of mind®

1.800.756.5596

APRIL 2022 ISSUE

IN THIS ISSUE

NOTE: If any of these links are not working for you, click here to view this email in your browser.

Last Month's "Sorry, Kids, We Can't Talk to You!" Article: A Letter from the Editor

We received numerous responses to last month's lead article, "Sorry, Kids, We Can't Talk to You!". Most were understanding of our unique restrictions, as attorneys for a parent, when communicating with and sharing our file information with children of our client. These require the client's consent. Some parents immediately asked us to place in their file right now their consent for their children to have full ability to

Client Testimonials

RECIPE OF THE MONTH:
Air Fryer Salmon

FREE DOWNLOAD:
Why You Should Review Your Estate Plan?

Quote of the Month

LIVING TRUST SEMINARS

These seminars are for the public and also for our existing clients who want to bring family or friends!

PLEASE NOTE:
Some of our seminars listed below are currently being held in-person. If you, or someone you know, would like to attend a virtual seminar instead, including any friends and family who might not live in the area, we also have some limited virtual seminars (noted below), or please send us an e-mail and we can book a private viewing of our seminar online.

(Also note: We may provide services to anyone residing in California without them having to travel to our offices.)

IN-PERSON LIVING TRUST SEMINARS

SATURDAY
April 2nd
9:30am - 11:30am
Torrance Marriott Hotel
3635 Fashion Way
Extremely Limited Capacity

REGISTER

communicate with us and access to their file information.

We may certainly enter a client's consent into our file now. Preferably, we ask such consent to be placed in a written and signed letter to us. We may also request an in-person visit to verify the consent.

However, please understand that such a *prospective* consent - - given to us far in advance of a child's future communication with us or request for file information - - may need to be renewed by us and given again by the client at or near the time of such child's communication or request. This is because, during the passage of time, many factors relating to an *informed* client consent may have changed. For example, the client's relationship with the child may have changed, or the child's circumstances and possible third-party influences, or the client's wishes pertaining to the child in the estate plan (the child's role as Successor Trustee or as a beneficiary). You may go ahead and send us your consent now. Just know that we may need and ask again for your consent in the future.

Spring Cleaning Therapy (for You and the Whole Family!)

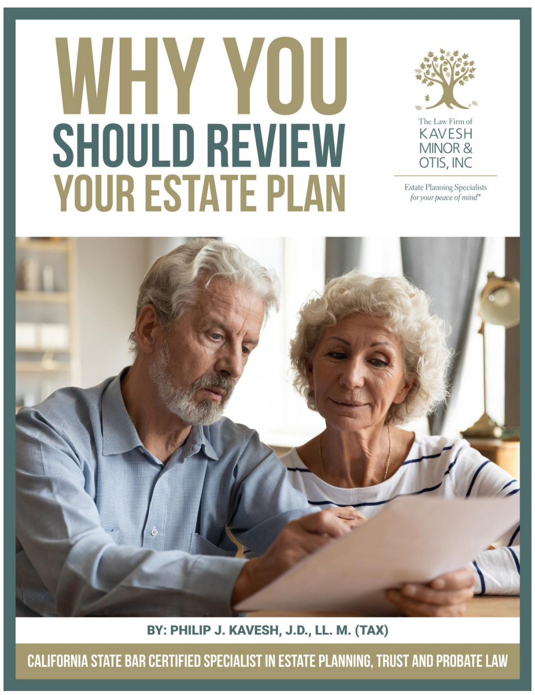
VIRTUAL
LIVING TRUST SEMINAR

TUESDAY
April 26th
9:30am - 11:00am
Online Webinar

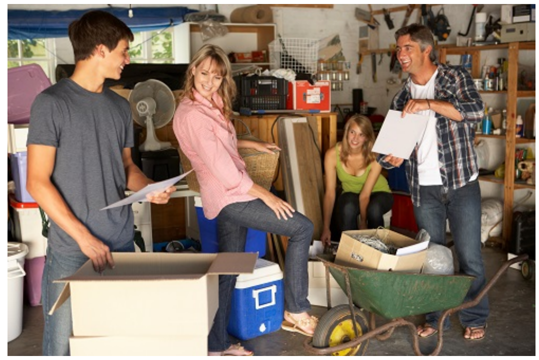
REGISTER

Share   Invite a Friend

FREE DOWNLOAD



Most people feel a weight has been lifted from their shoulders after signing their Living Trust and estate plan documents. While this feeling is well-deserved, it's important to realize that your estate plan will need maintenance. You wouldn't expect your car to run properly if you skipped tune-ups and service



It's that time of the year again, where the flowers begin to bloom, the birds are happily chirping, and the sun is beginning to shine a bit brighter and warmer. However, perhaps your house is still feeling the "winter blues", with all kinds of clutter and things that could be tidied. Spring cleaning is an annual tradition that allows us to revive our homes, but it can be a daunting task to even think about.

Beyond the obvious benefit of simply having a neat and tidy home, a couple of other big benefits that come from decluttering include the prevention of pests, dust, mold and mildew, which can trigger a lot of health-related issues, including asthma and allergies. Additionally, less stuff equals less stress. There have been numerous studies that confirm that clutter can increase cortisol levels, which means that it's causing unnecessary stress and you may not even realize it! With a less cluttered home, you will be able to find things easier, have less decisions to make, and less "stuff" to have to manage or wade through. There's fewer distractions, less mess to constantly clean up, and it can help your whole family in the long appointments, and your estate plan may not work when the time comes, as you desired, without an occasional review.

Do You Know What Would Happen If Your Estate Plan Was Activated Today?

The sad truth is that most estate plans do eventually become out of date, causing problems when someone (or their spouse) becomes disabled or passes away. This is why our founding attorney Philip J. Kavesh created an easy-to-follow-checklist to determine whether it's time to review your trust.

REQUEST A COPY

REMINDER: WE ARE OPEN!

As a reminder, our offices are now officially open for business for clients run (more to come here later).

Spring Cleaning Tips

It can be very overwhelming to think about tackling a big task like spring cleaning, particularly if you have a lot of rooms or a lot of stuff to sort through. Here are some tips to help you navigate through this process...

READ ON

When a Social Security Recipient Dies, Survivors May Be Eligible for Benefits

Courtesy of Elder Law Answers

The decedent's payments need to be stopped, but survivor's benefits may be available to the spouse or, in certain cases, children.

If a loved one who was receiving Social Security dies, you need to notify the Social Security Administration as soon as possible.

to come for in-person meetings. We have limited our visitor capacity and all the necessary safety precautions and protocols are in place at our premises to keep our clients and our staff safe. In addition, all of our attorneys and staff are fully vaccinated.

We know that virtual meetings have not been accessible or preferred by some and we are happy to be able to offer in-person meetings again. We will still have virtual meetings available for those who cannot or do not wish to come into the office at this time.

Often the funeral home does this as one of its services, but if not, you can notify Social Security by calling 1-800-772-1213 or contacting your local Social Security office. Benefits are not paid for the month the recipient dies and are not prorated. So, even if the recipient dies in the middle or end of the month, Social Security will...

READ ON

A Look at Your Financial Planning Health

Perhaps one of the biggest benefits of a properly built and maintained estate plan is peace of mind. It's peace of mind knowing that if something were to happen to you, you and your loved ones have all of the instructions on what to do and how you want things to be handled.

But, did you know that estate planning is just one of the key components of overall personal financial planning?

In addition to estate planning, your overall financial health also includes planning for your retirement savings, cash flow, insurance and taxes, and reviewing your financial resources for funding educational needs and major purchases. Having all of these key issues addressed and properly coordinated with your estate planning is one way to assure your and your family's overall financial health.

Here at Kavesh, Minor & Otis, we are committed to helping our clients with all of their estate and financial planning needs. So, we have aligned ourselves with qualified financial professionals.

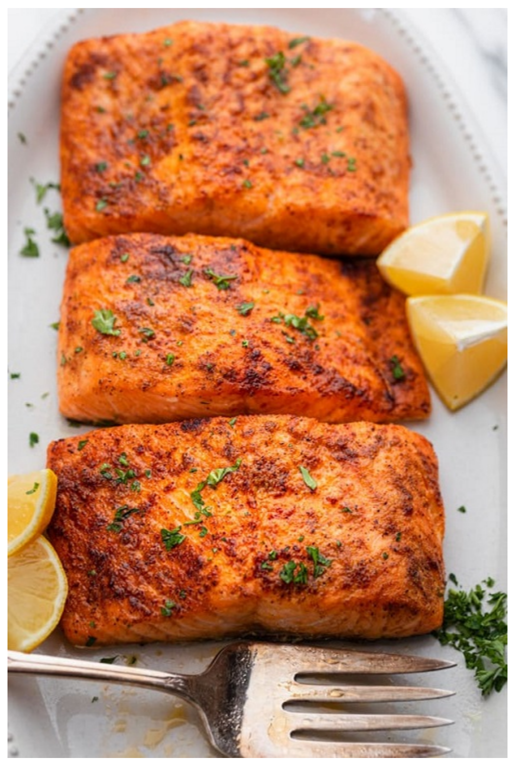
All of our clients are eligible to schedule a ***FREE*** consultation with one of our affiliated financial advisors at Pence Wealth Management.

To schedule a free consultation with one of our affiliated financial professionals, please call 1-800-731-3623.

DISCLOSURE: Pence Wealth Management does not provide legal and/or tax advice or services. Please consult your legal and/or tax advisor regarding your specific situation. E. Dryden Pence III and Laila Marshall-Pence are Registered Principals with LPL Financial. Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor. Member FINRA/SIPC. LPL Financial and Pence Wealth Management are separate entities.

RECIPE OF THE MONTH

Air Fryer Salmon



Air Fryer Salmon is a quick and easy way to cook salmon, which results in seared edges and tender, flaky center. Ready in 10 minutes, low carb & low calorie.

INGREDIENTS

- 4 salmon fillets 6 ounces each
- 1 tablespoon olive oil
- 1 teaspoon garlic powder
- ½ teaspoon paprika
- Salt and pepper to taste
- Lemon wedges for serving
- Tartar sauce for serving

DIRECTIONS

1. Preheat the air fryer to 400°F.
2. Rub each fillet with olive oil and season with garlic powder, paprika, salt and pepper. Place the salmon in the air fryer and air fry for 7-9 minutes, depending on this thickness of the salmon. Please note, time may vary between air fryers.
3. Open basket and check for desired doneness with a fork. You can return the salmon for another 1 or 2 minutes as necessary.

NOTES

- **Storage:** Air fried salmon will keep well in an airtight container for up to 3 days.
- **Freezing Instructions:** Freeze the pieces of salmon in an airtight container or freezer for up to 3 months. Thaw in the fridge overnight before you use it.

** Please note the nutrition label does not include the green beans.*

SOURCE: www.feelgoodfoodie.net

CLIENT TESTIMONIALS

"I could not have anticipated any better support or advice from Peter. He was patient with explanations and the answering of my questions. We spent 2 hours at the end of the day reviewing and adjusting the family trust as necessary following the passing of my husband. At no time did I feel pressured or rushed."
—Barbara H.

"It was a very productive visit. Peter helped us put all our assets in order and gave us thorough advice on what I need to do to make sure we put right beneficiary in place. This gives me peace of mind. Thank you for helping us out of trouble later."
—Eden D.

"My appointment was to review my living trust and to make any necessary changes or updates. Ms. Jane Lee was very kind and experienced in working with me. We reviewed and she asked pertinent questions where there could be change options. She explained everything clearly and answered my questions to my understanding. Ms. Lee was very efficient and knowledgeable in reviewing my living trust. I appreciate her kindness and patience."
—Violet W.

Thank you for these wonderful client reviews!

We know that our clients and all the members of our community have many options to choose from when it comes to assisting with their estate planning needs. It is very gratifying to us that people put their trust in us to help them with these important decisions that will impact them and their loved ones for years to come.

Many of our clients have asked how they can support us in return and they have done so by not only referring their friends and family, but also by taking the time to leave us an online review (which we'd really appreciate, if you haven't done so already). Below are a handful of websites you can choose from to leave a quick online review of your experience with our firm.

Thank you, in advance, for your help! We look forward to continuing to serve you and your loved ones for many more years to come!

REVIEW US ON Google

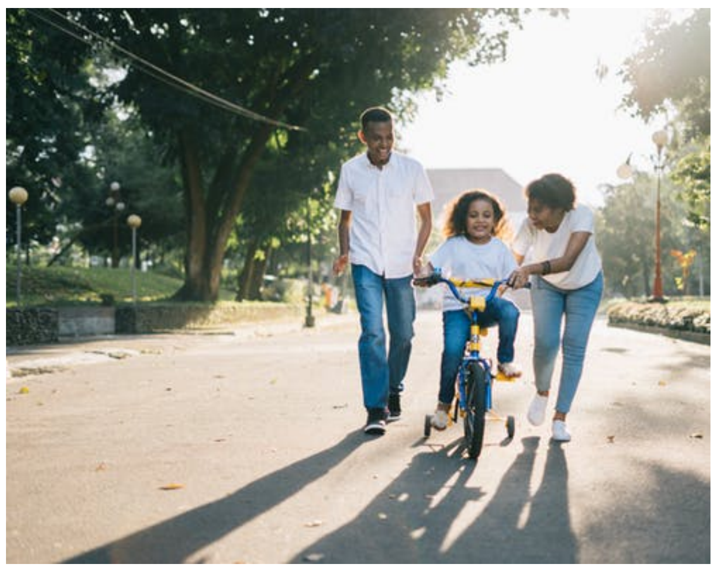
yelp

facebook BUSINESS PAGE

QUOTE OF THE MONTH

"There are only 2 days in the year that nothing can be done. One is called YESTERDAY and the other is called TOMORROW. TODAY is the right day to love, believe, do and mostly live."

—Dalai Lama



OFFICE LOCATIONS

For your convenience, we have multiple office locations throughout Southern California. NOTE: COVID-19 regulations now permit us to meet with you in person at our offices, but personalized meetings are still available through Zoom, FaceTime or telephone.

MAIN OFFICE

TORRANCE OFFICE
990 W. 190th Street, Suite 500
Torrance, CA 90502

TELEPHONE NUMBER

1.800.756.5596

OTHER LOCAL OFFICES

PASADENA OFFICE
790 E. Colorado Blvd., 9th Floor
Pasadena, CA 91101

ORANGE OFFICE
333 City Drive West, 17th Floor
Orange, CA 92868

WOODLAND HILLS OFFICE
5850 Canoga Avenue, 4th Floor
Woodland Hills, CA 91367

NEWPORT BEACH OFFICE
5000 Birch Street, Suite 8000
Newport Beach, CA 92660

The testimonials in this newsletter and throughout our website were provided by actual clients. To maintain their privacy, their names may be abbreviated and their photos are not shown. Please note that testimonials do not warrant, guarantee or predict your particular results. Actual client testimonial letters may be viewed by you in several "Thank You" books, proudly displayed at our main office lobby.

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