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The Law Firm of KAVESH MINOR & OTIS, INC

Estate Planning Specialists
for your peace of mind®

1.800.756.5596

FORWARD NEWSLETTER TO A FRIEND

AUGUST 2023 ISSUE

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IN THIS ISSUE

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Attorney Peter Keon Celebrates 20 Years at KMO!

On July 30th, Peter celebrated 20 years at Kavesh, Minor & Otis! Congratulations, Peter! 🎉 🍻

[Are You a Member of Any Groups, Clubs or Organizations?]

[Client Testimonials]

FREE REPORT:
[“Why Can’t I Speak With My Parent’s Attorney About His or Her Estate Plan?”]

RESTAURANT RECOMMENDATION:
[Manhattan Beach Post]

[Quote of the Month]

LIVING TRUST SEMINARS

For those who don't yet have a Trust, but also those who have one and may need to review and update it! Both the public and our existing clients are invited - - and please bring your family or friends!

NOTE: All of our seminars listed below are now being held in-person. If you, or someone you know, would like to attend a seminar, but cannot attend a live one, please [send us an e-mail] so we can explore other options.

(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
August 19th
9:30am - 11:30am
Torrance Main Office
990 W. 190th Street
Suite 500 (5th Floor)
Extremely Limited Capacity

A Look Back at My Back and Forth Path
by Attorney Peter Keon

Peter just celebrated his 20th anniversary with our firm and this gave him pause to reflect upon his life’s path to where he is today.

I grew up in the Philadelphia area, attending high school and college there. My academic focus from an early stage was on accounting, and I took accounting in high school. I liked the precision of working with

REGISTER

THURSDAY
August 24th
9:30am - 11:30am
Torrance Main Office
990 W. 190th Street
Suite 500 (5th Floor)
Extremely Limited Capacity

REGISTER

THURSDAY
September 7th
9:30am - 11:30am
Torrance Main Office
990 W. 190th Street
Suite 500 (5th Floor)
Extremely Limited Capacity

REGISTER

Share Invite a Friend

FREE REPORT

numbers and using them to identify and solve problems. In college, my major was in business administration and accounting, with a minor in economics. At some point in college, the thought was put into my head that if I wanted to really have a significant career I may want to consider the combination of ultimately being a CPA and an attorney. But I wasn't sure how, when, and where that would happen. Now I realize. . .

It All Started With a Road Trip

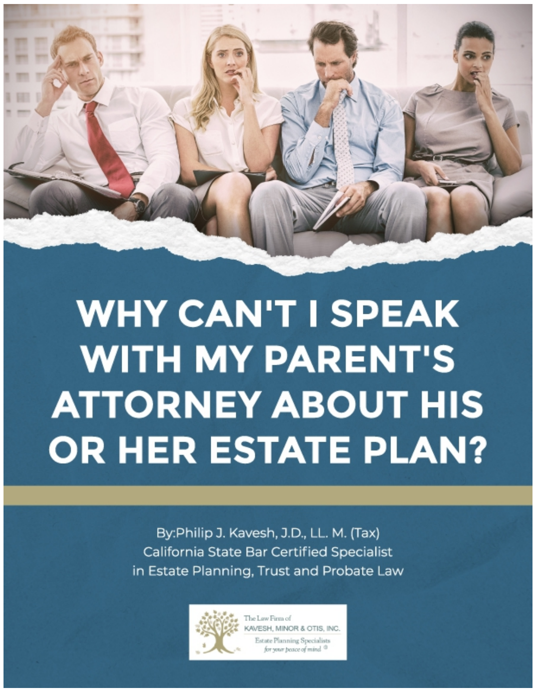
When I graduated from college in 1986, I and my best friend Tim (whom I had known since I was 10 or 11) thought, after all these years of school, we were either going to go to Europe or across the country, and we debated it. There was some upheaval in Europe with terrorism and political instability, so we thought that we would pass on Europe and decided to circle the United States instead.

In order to enjoy the beauty of the country and be free to set our own schedule, we decided to travel by car but not in our own cars, which neither of us owned at that time. We ended up being very fortunate in that we were able to...

READ MORE

SPECIAL EVENT

What Impact Will Inflation, Rising Interest Rates, and a Volatile Stock Market Have



The estate planning process is generally perceived by parents and their loved ones as a "family affair". Often times, adult children help their parents put together the necessary paperwork to bring to the attorney meeting, take them to the meeting, and even want to participate in the meeting.

However, the attorney-client relationship with the parents is a unique one that has particular confidentiality and other limitations which the attorney is bound by and must adhere to.

In this free report, experienced California Estate Planning Lawyer Phil Kavesh explains why children often aren't permitted to speak with their parent's lawyer about the parent's estate plan and how children may successfully overcome this apparent roadblock.

on Your Investments and Retirement?

Negative news is prevalent in the media. Rising inflation, increasing interest rates, federal reserve action, and political turmoil might have you asking, **what does my financial future look like?**

It's a question many people are asking but not getting answered, until now.

Join us for a special presentation by Dryden Pence, **a Harvard educated Economist** with over **30 years of industry experience**. He is a frequent TV guest on Fox Business, Bloomberg, CNBC, and Yahoo Finance. Mr. Pence serves as the Chief Investment Officer for Pence Wealth Management, which was ranked as the **#7 Registered Investment Advisory Firm by Forbes in 2022**.

Get a simple-to-understand explanation of what is **affecting the markets**, what is **anticipated to happen**, and how this Top Investment Manager is navigating through it all.

WEDNESDAY
August 16th
Torrance Main Office
990 W. 190th Street (Suite 500)
10:00am to 11:30am
EXTREMELY LIMITED SPACE

REQUEST REPORT

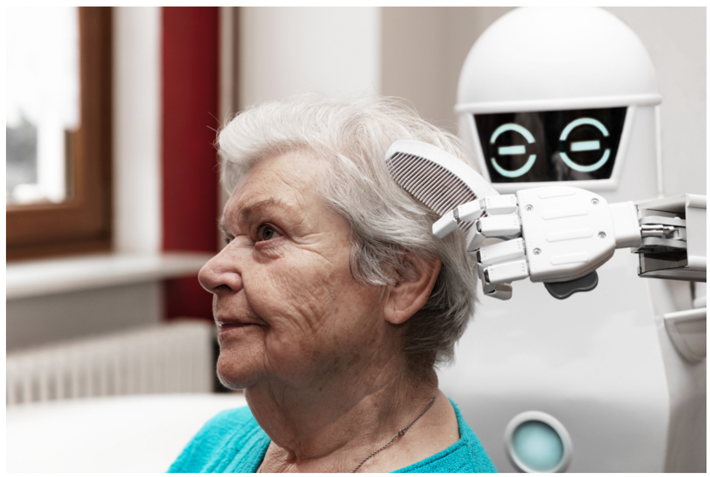
REGISTER

Can't attend this seminar? No problem!
Just reply to this e-mail and we will notify you of any future dates that we may have available.

Will Robotics and AI Be the Future of Elder Care?

Courtesy of

ElderLawAnswers



Adults 65 and older constitute the fasting-growing age demographic in the United States. When it comes to elder care, this expanding population is facing a scarcity in people equipped to support them as they get older.

One estimate predicts a shortage of 151,000 paid direct care workers and 3.8 unpaid family caregivers by 2030, increasing to a gap of 355,000 paid workers with 11 million unpaid family caregivers by 2040.

Technological advancements in robotics and artificial intelligence ("AI")may be opening the doors to... READ ON

PENCE PERSPECTIVE:
Inflation and Recession – So, What?

Dryden Pence, Chief Investment Officer provides insights into the economic factors driving the recession conversation in the latest edition of “So, What?”.

PENCE WEALTH MANAGEMENT

07/18/2023

PENCE IN THE MEDIA
The Fed Can Stick the Landing

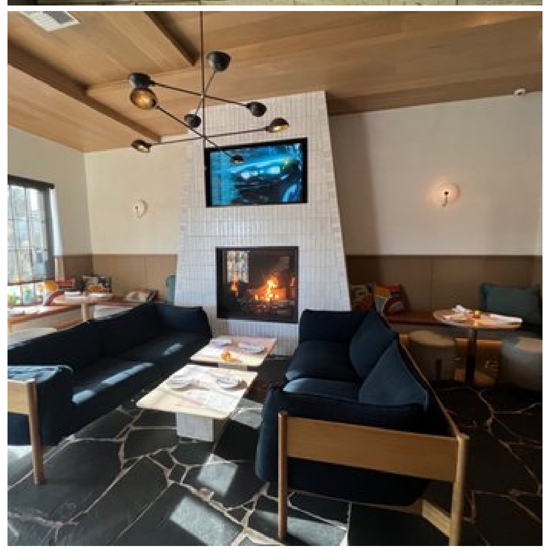
Pence Wealth Management President Laila Pence discusses the federal reserve, increasing interest rates and inflation, market outlook, and talks U.S. investment strategies.

PENCE WEALTH MANAGEMENT

Source: Bloomberg Daybreak: Australia, 07/17/2023

RESTAURANT RECOMMENDATION:
Manhattan Beach Post

If you're in search of a nice date spot or a location for girl's (or guy's) night out, then look no further than Manhattan Beach Post—a modern, upscale restaurant "crafting unforgettable culinary experiences through adventurous and soulful cuisine".



LOCATION

1142 Manhattan Ave.
Manhattan Beach, CA 90266
310-545-5405
VIEW MENU

HOURS OF OPERATION

Monday – Friday
5:00pm – 9:30pm (Dinner)

Saturday – Sunday
10:00am – 2:30pm (Brunch)
3:00pm – 5:00pm (Limited Menu)
5:00pm – 9:30pm (Dinner)

CLIENT TESTIMONIALS

"Excellent law firm. They are very professional and thorough. Top notch lawyers and staff. They follow-up to make sure the trust is up to date and if any changes need to be made. Highly recommend them for all family trust matters."

—Ken G.

"We have worked with Peter and his associates since March 1999. Excellent customer service👏👌👍 and knowledge of current tax laws that will affect THE LIVING TRUST. Free reviews every 3 years. The COST for services are reasonable for TAX AVOIDANCE!!"

—Rita P.

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 (for example by forwarding this e-mail newsletter), 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 couple 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

QUOTES OF THE MONTH

"Family is not an important thing. It's everything."
—Michael J. Fox

"When all the dust is settled and all the crowds are gone, the things that matter are faith, family, and friends."
—Barbara Bush

Are You a Member of a Group, Club or Organization?

Are you a member of a local civic group, like Rotary or Kiwanis? Or perhaps are you a part of a church club? Or are you working or retired and still part of a certain employee group within your company? If so, did you know that we can arrange a private seminar just for your group to discuss the importance of a properly built and maintained estate plan?

For years, we have spoken before such groups, clubs or organizations, including Toyota, Honda, Nissan, Hughes Aircraft, TRW, Aerospace, County Apartment Owners Association, Rolling Hills Covenant Church, and many more!

If you are a member of a group, club or organization, please reach out and let us know if they may have an interest in such a short presentation and we will take care of the rest! Simply contact our Marketing Director, Ketzalli Lujan, by e-mail at ketzalli.lujan@kaveshlaw.com or by phone at 1-800-756-5596.

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

FORWARD NEWSLETTER TO A FRIEND

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.

DISCLOSURE: Disclosure: The opinions voiced in this material are for general information only and are not intended to provide specific advice or recommendations for any individual. Historical performance is no guarantee of future results. All market indices are unmanaged and may not be invested into directly. The economic forecast set forth may not develop as predicted and there can be no guarantee that strategies promoted will be successful. All investing involves risk including loss of principal. 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. Pence Wealth Management, Inc. ("PWM") is a financial services practice with LPL Financial LLC ("LPL Financial") comprised of multiple financial professionals that provide a series of services including personal investment advisory, third party managed advisory, and brokerage services. PWM, LPL Financial, and Kavesh, Minor & Otis are separate entities.

The Forbes raking of America's Top RIA Firms, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone, virtual, and in-person due diligence interviews, and quantitative data. The algorithm weighs factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices and approach to working with clients. Portfolio performance is not a criterion due to varying client objectives and lack of audited data. Neither Forbes nor SHOOK receive a fee in exchange for rankings. Pence Wealth Management ("PWM") is a financial services practice with LPL Financial LLC ("LPL Financial") comprised of multiple financial professionals that provide a series of services including personal investment advisory, third party managed advisory, and brokerage services. Pence Wealth Management, Inc. is an investment adviser registered with the State of California to provide financial planning services. Both PWM and LPL Financial are considered part of the application process for ranking.

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