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The Law Firm of
KAVESH
MINOR &
OTIS, INC

Estate Planning Specialists
for your peace of mind®

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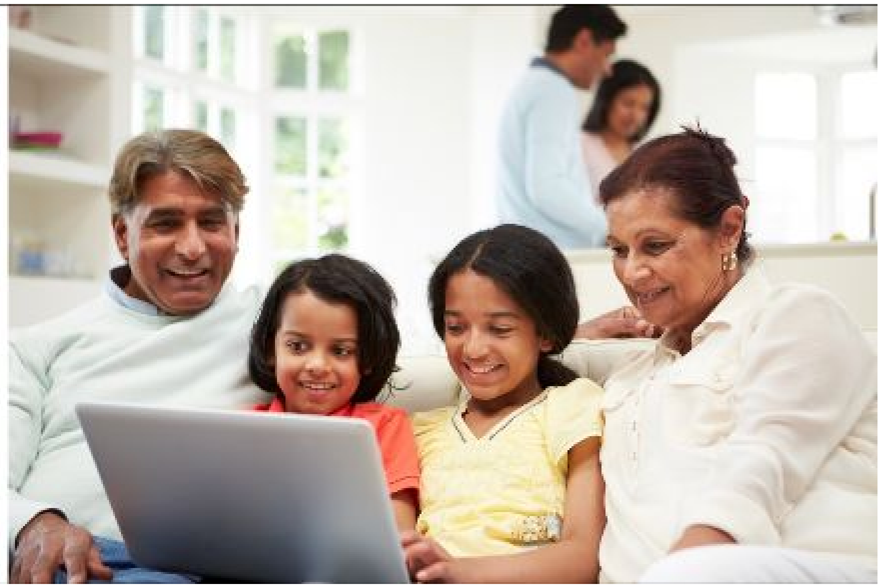

MARCH 2023 ISSUE

IN THIS ISSUE

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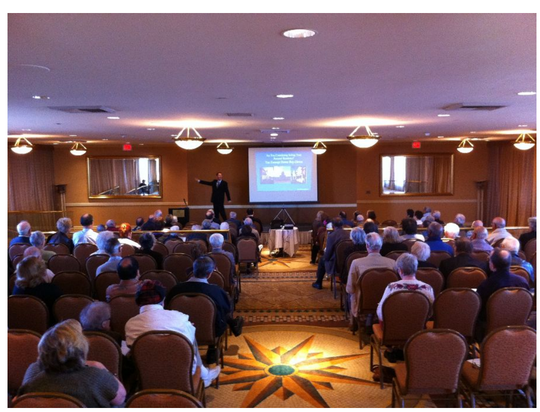
A Funny Thing Happened on the Way To...
(Some of My Craziest Seminar Stories from Over the Years)

by Attorney Philip Kavesh



Client Testimonials

FREE REPORT:
Questions You Should Ask When Choosing an Estate Planner

RESTAURANT RECOMMENDATION:
The Kettle

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

WEDNESDAY
March 8th
9:30am - 11:30am
Torrance Main Office
990 W. 190th Street
Suite 500 (5th Floor)
Extremely Limited Capacity

REGISTER

SATURDAY
March 11th
9:30am - 11:30am

If you have ever attended one of my presentations, you already know that one of my favorite things in life and throughout my career has been presenting educational seminars on estate planning. What you may not know, however, are some of the unusual stories and occurrences I have experienced in doing over 3,000 seminars over the past 35 plus years.

I've had so many funny, odd and not-so-funny events happen on the way to, during and after seminars that I really have to probe my memory to pick out the most unusual ones.

The Usual “Stuff”

Of course, I've encountered all the usual or typical “goofs” that any seminar speaker has experienced over time. I've traveled to the wrong hotel, or gotten there on the wrong day and time. Or, I've arrived to the right venue and found the seminar room locked and no one could find the key, or found the room open but all the chairs locked up in the storage closet with no one able to assist us in getting the chairs out. I've forgotten the slides or handouts or brought the wrong ones. I've suffered equipment failures, power outages, the projector screen collapsing and even the overhead sprinklers going off! However, I'll bypass all these mundane misfortunes and go right to the weirdest, most memorable occurrences.

Let me start with some of the "lighter" ones.

Torrance Main Office
990 W. 190th Street
Suite 500 (5th Floor)
Extremely Limited Capacity

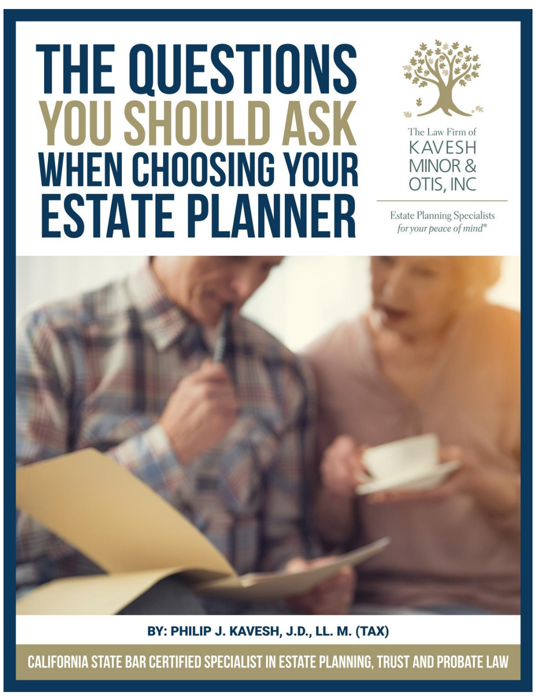
REGISTER

THURSDAY
March 30th
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



If you have begun the estate planning process, you may have found that it can quickly become overwhelming. Even if you

The Jokester & His "Match"

I recall that once, during a seminar, I was talking about how all your assets comprise your estate, even your antiques and junk - - and quipped "you know there's a fine line between the antiques and junk!" Immediately, a gentleman turned to his wife and...

READ MORE

SPECIAL EVENT

Will the Volatile Economy and Stock Market *Wreck* Your Retirement?

You hear so much negative news from the media - - War, Inflation, Rising Interest Rates, and a Volatile Stock Market. How can you make sense of all of it and properly protect your financial future?

Many clients have asked us these questions. That's why we have arranged a very special presentation by a nationally recognized expert on are familiar with the terms and designations in your documents, you have no way of knowing whether the choices you make are the best course of action for you and your family.

Of course, there are professionals who specialize in estate planning, and each one brings different experiences and knowledge to the table. So whom do you trust with the biggest decisions of your life—the ones that could continue to have an effect on your loved ones for years into the future?

We Know How Hard it Can Be to Place Your Trust in a Stranger

That is why our attorney Philip J. Kavesh wrote *The Questions You Should Ask When Choosing Your Estate Planner,* a simplified but vital guide to estate planning service providers for California residents to follow.

REQUEST REPORT

the economy and markets, Dryden Pence. Mr. Pence has over 30 years of financial industry experience and is a frequent TV guest on Fox News, Bloomberg and CNBC. He is also the Chief Investment Officer of one of Barron's Top 100 Private Wealth Management Teams.

If you ever wanted someone to help explain - - in plain English - - what is really going on, this is your chance. Come and learn what is happening now, what is ahead, and how one of America's top investment managers is navigating through it all.

TUESDAY
March 21st
10:00am to 11:30am
Torrance Main Office
990 W. 190th Street, Suite 500
Extremely Limited Capacity

REGISTER NOW

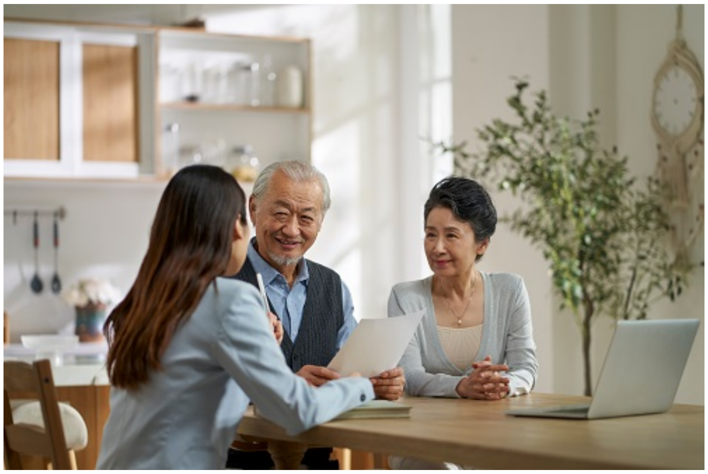
Can't make this date?
Call us and ask about the next one!

The Parent Care Conversation

Courtesy of
Elder Law Answers

One of the hardest things for aging parents and their adult children to do is sit down and have a frank discussion about the future. Such conversations are difficult for two principal reasons: they involve acknowledging the realities of aging and mortality, and financial details must be shared. But putting off these conversations until it's too late can have catastrophic consequences, both financial and emotional.

Dan Taylor, an attorney and financial planner, has written a book called, *The Parent Care Conversation: Six Strategies for Transforming the Emotional and Financial Future of Your Aging Parents*, which helps adult children broach the subject of future planning with their parents and, once the conversation gets rolling,



to provide a useful framework for discussion. Taylor presents a system that grew out of his experience with his own dad's care.

For Taylor, the "Parent Care Conversation" is comprised of six separate conversations: The Big Picture Conversation (the parents' overall vision for their future); The Money Conversation (financial planning needs and strategies); The Property Conversation (how to distribute property and possessions); The House Conversation (what to do with the family home); The Professional Care Conversation (the parents' preferences for care, should they need it); and The Legacy Conversation (a summing up of the parents' journey).

In this way, Taylor allows children of aging parents to... READ ON

Financial & Market Update

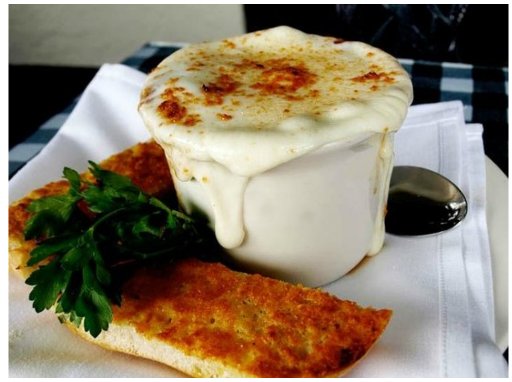
Courtesy of
Pence Wealth Management

With all of the changes happening in the financial markets these days, it can be challenging to stay on top of the latest news. This is why the advisors at Pence Wealth Management have put together podcasts and videos with a variety of important and relevant financial and market updates. Check out this video interview of Dryden Pence, Chief Investment Officer at Pence Wealth Management, as he talks about Fed rate increases and the narrative changing from T.I.N.A (There is No Alternative) to B.A.B.Y (Bonds Are Back Y'all) on CNBC recently.

PENCE | WEALTH MANAGEMENT

RESTAURANT RECOMMENDATION
The Kettle

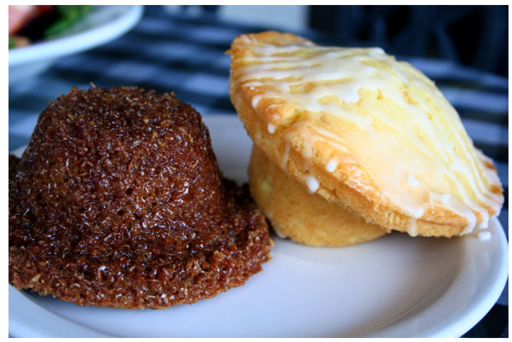
If you've lived in the South Bay, then chances are you may have frequented The Kettle in Manhattan Beach. However, if you haven't done so yet (or if you haven't gone recently), this is a local favorite worth checking out. The Kettle has been around for over 40 years and is located right off of the corner of Highland Avenue and Manhattan Beach Boulevard. It's open 24 hours, 7 days a week, and is well-known for its homemade muffins, French onion soup, burgers and more! Grab some friends and loved ones and stroll on over and enjoy the beautiful scenic views from their patio and delicious food!



ADDRESS
1138 Highland Avenue
Manhattan Beach, CA 90266

HOURS OF OPERATION
Open 24 hours a day

SEATING
Indoor / Outdoor Heated
Patio with Ocean Views
Short Bar Seating
Family / Kid-Friendly



Have you eaten at The Kettle before? What's your favorite item on the menu?

CLIENT TESTIMONIALS

“My wife and I had attended a seminar about a year ago, but we were still a bit uncertain to proceed because of our somewhat complicated situation. Since we really needed to update our Living Trust, we contacted them again late last year and were set up with Peter Keon, a CA State Bar certified specialist in Estate Planning and Trusts. As we found out, Peter is very knowledgeable in both of these subjects. Due to the pandemic, we communicated with Peter exclusively by phone and emails only. Peter was friendly, patient, and very professional with our many questions and comments. He gave us good advice and laid out the pros and cons of different alternatives to fit our individual cases and scenarios, and finally produced a Living Trust that hopefully will be good for many

"Kavesh, Minor, and Otis prepared a trust for my mother, who recently passed away. My communication with Legal Assistant Shantadee Gadson has been the only bright spot since my mother's passing. She has a welcoming, understanding, yet uplifting quality to her when she speaks to you. While you may not contact Kavesh to speak with their legal assistants, if you are fortunate enough to get her on the phone, you are sure to feel much better once the call has ended. Kavesh, Minor, and Otis is a very reputable trust law firm but their best asset may very well be in the form of Shantadee Gadson. Thank you, Ms. Gadson.”

—Kevin M.

years. His vast subject knowledge and experience really showed, and we are happy with the results. We highly recommend Peter Keon for Estate Planning and Trusts."
—Boris R.

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 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

QUOTE OF THE MONTH

"I'm a great believer in luck, and I find the harder I work, the more I have of it."
—Thomas Jefferson

REMINDER: IN-PERSON MEETINGS!

Now that COVID has subsided, most of our clients feel that their private estate planning matters are better discussed in-person, rather than over a Zoom meeting or by telephone. 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 still have virtual meetings available for those who cannot or do not wish to come into the office at this time.

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

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

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

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.