

Why Choose Us to Administer YOUR Trust or Estate?



When comparing trust and estate attorneys, fees are important but also be sure to consider the following:

	KAVESH, MINOR & OTIS	OTHER FIRM?
<p>Specialized Expertise</p> <ul style="list-style-type: none"> All our attorneys are State Bar Certified Specialists in Estate Planning, Trust and Probate Law. Estate Planning and Administration are All That We Do! Two of our attorneys have Master's Degrees in Tax Law and we are knowledgeable in not only trust and estate income tax, and estate tax, but California property tax We are recognized leaders in our field and teach and mentor fellow trust and estate attorneys from all over the country 	✓	
<p>Unique Level of Experience</p> <ul style="list-style-type: none"> During our more than 42 years in business, we have designed and established more than 15,000 Living Trust centered estate plans, as well as administered after the maker's death in excess of 4,000 Trusts (more than just about any other law firm in Southern California) We have been able to avoid many full Probate proceedings through a one-time court appearance and, when necessary, successfully handled hundreds of Probates We have successfully filed over 1,000 Estate Tax Returns and have an outstanding record with the IRS 	✓	
<p>Fixed Fee</p> <ul style="list-style-type: none"> All our Trust and Estate Administrations are billed on a fixed fee basis, quoted in advance and agreed to in writing. We don't ask for a blank check and bill you by the hour A fixed fee encourages us to work more efficiently and complete administrations more quickly 	✓	
<p>We Handle Many of the Tasks Involved, for You the Trustee</p> <ul style="list-style-type: none"> Gathering certain asset information from third parties on your behalf Changing title to assets, such as deeds for California real estate, assignments of interests in entities and letters to facilitate transfers of other assets Spotting and correcting issues which others may miss such as potential property tax reassessment and added income tax and capital gains tax on beneficiaries Adapting the original estate plan to better protect beneficiaries whose needs or circumstances may have changed, most of the time without the delays and expense of court Referring you to affiliated professionals for critical investment and financial planning advice Getting a signed Settlement Agreement and Receipt of Distribution from each beneficiary to avoid continuing claims Providing you with a plain-English Trustee Manual to make sure you know what to do and what not to do and carry out your duties properly and timely All the above items help to protect you, the Trustee or Executor, from potential personal liability, out of your own pocket! <p style="text-align: right;"><i>(turn to the other side...)</i></p>	✓	

Why Choose Us to Administer YOUR Trust or Estate? (continued)

**KAVESH,
MINOR
& OTIS**

**OTHER
FIRM?**

<p>Beneficiaries Receive a Helpful, Plain-English Manual</p> <ul style="list-style-type: none"> • Beneficiaries who receive their inheritance in a “Personal Asset TrustSM” which they control and have access to • Manual involves valuable, easy-to-use checklists • So they may protect their inheritance from claims of spouses, divorces, creditors, lawsuits, the government and the IRS 	✓	
<p>We Help Beneficiaries Set Up (or Update) Their Own Estate Planning</p> <ul style="list-style-type: none"> • For beneficiaries residing in California, we can help set up (or update) their own estate plan • This maintains or increases the benefits originally intended under the estate plan of the decedent 	✓	
<p>We Carry Liability Insurance That Covers Our Work</p> <ul style="list-style-type: none"> • We have liability insurance that covers \$1 million per claim and up to \$2 million total • Many attorneys do not back up their work this way! 	✓	

Remember too: Our administration fee is paid from the Trust or Estate and does not reduce any Trustee or Executor fee to which you may be entitled.



The Law Firm of
**KAVESH
MINOR &
OTIS, INC**

Estate Planning Specialists
for your peace of mind[®]

I acknowledge reviewing the above.

SIGNATURE: _____ DATE: _____

PRINT NAME: _____

The statements here are, in part, factual and in part, the opinions of the Law Firm of Kavesh Minor & Otis, Inc. and there are no legal or regulatory requirements that an attorney meet all these tests in order to properly administer your trust or estate.