



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

Estate Planning Specialists
for your peace of mind®

1.800.756.5596



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JULY 2024 ISSUE

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**LIVING TRUST
SEMINARS**

The Adventures (or Should I Say Misadventures?) of Boating with Dad

by Attorney Philip J. Kavesh

This story is a bit late for Father's Day, but I've decided to share it with you anyway.



For many years, as I grew up, I loved going boating with my Dad. These were special times when I often got to enjoy his company all by myself (particularly before my three younger brothers started to tag along!).

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

TUESDAY
July 9th

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

REGISTER

SATURDAY
July 13th

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

REGISTER

WEDNESDAY
July 24th

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

REGISTER



Share



Invite a Friend

We Discovered The River Wild

Dad's first boat was a light, fiberglass, 16-footer - - wildly overpowered with a 200 horsepower outboard engine! That was a big fishing advantage, because if Dad took off early from work at 3:00 in the afternoon we could race out to our favorite fishing spot, still get in a few hours and return before dark. Another advantage of that boat was its "walk-around" feature. The captain's seat and wheel didn't block the front (or "bow"). You could step around the edge of the entire boat and fish from anywhere, depending on what direction the current pulled your "line" and "sinker" or the fish swam away with your hook!

Our docking space (or "slip") was at the end of a small pier protruding out into the Maurice River (pronounced "Morris" by the South Jersey locals). Little did we realize at first that, as my Dad liked to quote from some famous poem, "Time and tide wait for no man." We soon learned (the hard way) about the importance of knowing the timing of the river's tide changes.

One afternoon, we traveled upriver, fished there for a while, and planned to race back to the dock. We didn't notice that, behind us, the river had receded. So, when we turned around and "floored the gas", we literally became grounded on an invisible sandbar, just under the water's surface. Dad then got the not-so-great idea of leaping out of the boat to push us off. Suddenly, he started to sink in the mud, which was like quicksand! Horrified and panicked, I extended out a fishing pole so he could hopefully grab it. I hadn't quite thought this through, as I was much smaller than Dad (and the pole was only designed to hold small fish). Somehow, miraculously, I was able to pull him back onto the boat (Thank Goodness!). The first thing he said was, "Don't ever tell your Mother about this!"

So, we got a little smarter and we started consulting the tide charts before we left the dock. Yet, another

FREE REPORT



After working so hard to provide for your family, it would be a tragedy if you were unable to pass on the fruits of your labor after your passing. Unfortunately, there are plenty of mistakes that can reduce the amount of an estate and threaten your family's future. These simple errors happen far too often, usually because people do not have accurate estate planning information.

You Can Avoid Common Estate Planning Mistakes

When you download your free copy of our book entitled, "The 10 Biggest Estate Planning Mistakes People Make", you will learn the biggest misconceptions and myths that can have a devastating effect on your relatives and property, as well as the actions you should take NOW to avoid future heartache.

[REQUEST REPORT](#)

river challenge soon presented itself. You see, we loved to milk every moment of fishing opportunity out of the day. We would fish until the first few moments of dusk and then dash back to the dock just before complete darkness and navigation blackout (we only had a large handheld flashlight!). What we didn't realize was...

[READ MORE](#)



This is a photo of Dad, a die-hard Eagles fan, at the helm, teaching my son how to navigate!

The Best Dating Apps for Seniors



Who is to say that you're "too old" or it's "too late" to begin dating again and finding love as a senior? Everyone deserves to experience the love and companionship that comes from finding that special someone. The problem may lie in finding the right person and how.

4th of July Holiday



In observance of Independence Day, our office will be closed on Thursday, July 4th. Our office will reopen for business on Friday, July 5th. Wishing you and yours a safe, relaxing, and "cool" holiday weekend! 😊

Thirty years ago, the idea of meeting a stranger online might have sounded a little wild and dangerous. However, with so many people now with smartphones and connected on the internet, meeting people online is far from uncommon.

The question is, where do you find these people? According to Forbes, [these are some of the best dating apps out there](#) for seniors.

Have you tried any of them? Have you ever dated (or married) someone you met online?

[READ MORE](#)

Happy 20th Anniversary, Kristina!



Kristina Schneider, Phil Kavesh's former Executive Assistant and currently working for the law firm's sister company, The Ultimate Estate Planner, Inc., celebrates 20 years with us. Kristina started working at Kavesh, Minor & Otis shortly after graduating from Pepperdine University. You may have seen Kristina at one of our seminars. She has helped the law firm with its seminars, e-mail newsletters, and supporting Mr. Kavesh. Currently, she is a Practice Success Coach, teaching other estate planning attorneys and their staff how to run a more successful estate planning practice using the model developed by Kavesh, Minor & Otis over its 43 years of experience. Happy Anniversary, Kristina!

RESTAURANT RECOMMENDATION The Strand House

Whether you're looking for a fun new spot for date night, Sunday brunch, or a summer hangout with friends and family, check out The Strand House in Manhattan Beach. With gorgeous views of the coastline, enjoy this delicious spot sometime this month.

LOCATION

117 Manhattan Beach Blvd

Manh
attan
Beac
h, CA
9026
6
(310)
545-
7470
info@
thestr



andhousemb.com

[VIEW MENU](#)



HOURS OF OPERATION

The Strand House

Mon, 5 PM - 10 PM

Tue - Fri, 11:30 AM - 10 PM

Sat & Sun, 10 AM - 10 PM

Weekend Brunch served 10 AM - 2:30 PM

Tue - Fri Lunch served 11:30 AM - 2:30 PM

The Strand Bar

Mon, 5 PM - 10 PM

Tue - Thu, 4 PM - 10 PM

Fri & Sat, 12 PM - 1 AM

Sun, 12 PM - 10 PM

For more information and pricing,

[click here.](#)



CLIENT TESTIMONIALS

“My in-laws had their Living Trust and Will done at Kavesh, Minor & Otis (KMO) with Peter Keon as their attorney back in 2004. After my father-in-law passed away in 2013, we met

“Jane Lee helped execute my late father's trust and transfer all its assets into my own trust. She was understanding of all the questions I had along the way, including

with Peter. He was extremely helpful in taking care of all the things that needed to be done. He was very thorough, and we never felt rushed during our time with him. I referred my friend and her husband to KMO when they were looking to have a Living Trust created. Over the years we've received emails inviting us to a Living Trust seminar. It's totally free, at a great location, and ours included a full breakfast. Phil Kavesh gave a great presentation! He took time to answer questions and we left with some very informative materials. After the seminar we decided it was time to make an appointment to have our Living Trust and Will (created by another firm in 1990) reviewed. We requested Peter as our attorney because of the positive experiences we've had through my in-laws. He is very professional and also very knowledgeable about the current laws and answered all of our questions. We are very pleased with the services offered by KMO and would recommend them to others."

—Denise N.

questions about the correspondence I received from the city and institutions while the assets were being transferred. I sometimes felt embarrassed by the questions I needed to ask, but she and other staff members were very understanding.."

—Jennifer E.



Thank you for these wonderful client reviews, Denise and Jennifer (both real clients)!

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!



QUOTE OF THE MONTH

From what we get, we
can make a living;
what we give,
however, makes a life.

Arthur Ashe

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.

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