



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

Estate Planning Specialists
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APRIL 2024 ISSUE

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When Was the Last Time You Checked Your Beneficiary Designations?

by Attorney Philip J. Kavesh



There are certain assets that you may have where you, as the account owner, completed a form called a Beneficiary Designation Form ("BDF") that will determine who will receive all or a portion of the assets upon your death. Such accounts include IRAs and other retirement accounts, annuities, and even bank

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 April 3rd

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

REGISTER

SATURDAY April 13th

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

REGISTER

THURSDAY April 25th

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

and brokerage accounts.

You may not realize that these beneficiary designations can override your Living Trust or Will, passing assets to unintended persons, or in the wrong amounts or wrong manner. These beneficiary designations should be reviewed periodically to make sure that they are up-to-date and align with your current estate plan wishes. Furthermore, if you own these assets and there is no named surviving beneficiary, your loved ones may wind up in Probate Court, which is both a lengthy and expensive process which can be easily avoided.

Below are some of the steps you may wish to take to ensure that your beneficiary designations are properly up-to-date.

STEP #1: List All of Your Assets and Accounts

First and foremost, make a list all of the accounts that you own. This will help you identify which accounts may require some form of beneficiary designation.

STEP #2: Contact Your Account Administrator

If you have an online account for an asset, you may be able to log into your online account and locate a list of your current beneficiary designations. If not, you may need to either call your financial advisor, insurance agent, banker or account administrator to have a copy of your current beneficiary designations sent to you (or reviewed by phone with you).

STEP #3: Review Your Beneficiary Designations

REGISTER



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FREE REPORT



WHY CAN'T I SPEAK WITH MY PARENT'S ATTORNEY ABOUT HIS OR HER ESTATE PLAN?

By: Philip J. Kavesh, J.D., LL. M. (Tax)
California State Bar Certified Specialist
in Estate Planning, Trust and Probate Law



The estate planning process is generally perceived by parents and their loved ones as a "family affair". Oftentimes, 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 that 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

Once you have access to your beneficiary designations, take a moment to review each one to ensure that you have properly designated beneficiaries. Some of your accounts may appropriately list your...

READ MORE

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



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...

how children may successfully overcome this apparent roadblock.

READ MORE

REQUEST REPORT

RESTAURANT RECOMMENDATION

Sausal

El Segundo



Have you heard of the restaurant, Sausal, in El Segundo? Sausal is a contemporary restaurant with Wood-fired and slow-roasted Mexican fare with Californian sensibility. Offering dine-in, take-out, and catering options, Sausal is the perfect spot for any social occasion, including happy hour, date night, girls' night out, or brunch. With an array of menu options, everyone in your group is sure to find something delicious to eat!



Have you tried Sausal yet?

LOCATION

219 Main Street
El Segundo, CA 90245

[VIEW MENU](#)



HOURS OF OPERATION

Sunday through Thursday
11:30am to 8:30pm



Friday and Saturday

11:30am to 9:30pm

CLIENT TESTIMONIAL

“I first went to one of your seminars by Phil Kavesh in 1990, and created my (our) own Family Trust written by, yes, Phil Kavesh personally. In recent years I have been working with Peter Keon whenever updating my Trust or the rare times I asked for advice.

A short time ago I visited Peter to consult with my plan to promote my adult children, possibly to co-trustees, to reduce my own load. I left kind of disappointed because Peter Keon recommended a "No" to my plan, but he explained correctly why I shouldn't do it that way. My Trusts (now two of them) are tightly written and never failed me. I feel Kavesh, et al, is a leading excellent team that has never failed me. Peter Keon knows what is right, and what is not, which is what I need.”

5-Star Google Review, February 2024

—Bill R.

Thank you for this wonderful review, Bill. You are absolutely right about us always seeking to advise and guide our clients to make the best decisions - - backed up by our combined over 80 years of experience in drafting and administering thousands of trusts after people have passed away! We are grateful for you and appreciate you entrusting us with these big decisions!

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

"Flowers don't worry about how they're going to bloom. They just open up and turn toward the light and that makes them beautiful."
—Jim Carrey



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

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

TELEPHONE NUMBER
1.800.756.5596

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

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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