



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

Estate Planning Specialists
for your peace of mind®

1.800.756.5596



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FEBRUARY 2024 ISSUE

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BOOK OF THE MONTH

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2024 Estate and Gift Tax Updates



Effective January 1st, 2024, the amounts each person can transfer each person can transfer estate and gift tax free have increased. Here's what you need to know.

Annual Gift Tax Exclusion

The IRS increased the 2024 annual gift tax exclusion due to inflation and now set the exclusion amount at \$18,000 per recipient—the highest exclusion amount in history. What

[Quotes of the Month](#)

[Part of a Group, Club, Church or Other Organization Looking for a Dynamic Speaker?](#)

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
February 3rd**

9:30am - 11:30am

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

Extremely Limited Capacity

[REGISTER](#)

**WEDNESDAY
February 14th**

9:30am - 11:30am

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

Extremely Limited Capacity

this means is that the amount you may gift each year, to as many individuals as you wish, is \$18,000 per individual (\$36,000 for a married couple). If you make a gift over \$18,000 to any one individual, you must file a gift tax return. The amount that is in excess of \$18,000 will then be deducted from your estate tax exemption. However, no estate or gift tax is due until such time as you have used up your entire estate tax exemption.

This takes us to the...

[READ MORE](#)

Seniors and Anti-Obesity Medication



If you watch the news, then you know that anti-obesity medications, such as Ozempic and Wegovy, have been making headlines for months. Celebrity after celebrity has come forward to discuss their weight loss success using anti-obesity medications.

If you are a senior, you may be wondering if these anti-obesity medications are safe for use.

[READ MORE](#)

REGISTER

THURSDAY
February 22nd

9:30am - 11:30am

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

REGISTER



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FREE REPORT

WHY YOU SHOULD REVIEW YOUR ESTATE PLAN

BY: PHILIP J. KAVESH, J.D., LL. M. (TAX)

CALIFORNIA STATE BAR CERTIFIED SPECIALIST IN ESTATE PLANNING, TRUST AND PROBATE LAW

Most people feel a weight has been lifted from their shoulders after signing their Living Trust and estate plan documents. While this feeling is well-deserved, it's important to realize that your estate plan will need maintenance. You wouldn't expect your car to run properly if you skipped tune-ups and service appointments, and your estate plan may not work when the time

Are You a Family Caregiver? New Bill Seeks to Lower Costs

Courtesy of ElderLawAnswers



A recently proposed legislation seeks to offer financial relief for unpaid family caregivers. Introduced in November 2023, the Lowering Costs for Caregivers Act of 2023 is the result of a bipartisan effort to lessen the costs of family caregiving. The American Association of Retired Persons (AARP) has also endorsed the bill.

If the act becomes law, it would...

READ MORE

Recognizing Malnutrition in Older Adults

Courtesy of ElderLawAnswers

comes, as you desired, without an occasional review.

Do You Know What Would Happen If Your Estate Plan Was Activated Today?

The sad truth is that most estate plans do eventually become out of date, causing problems if you (or your spouse) becomes disabled or passes away. This is why our founding attorney Philip J. Kavesh created an easy-to-follow-checklist to determine whether it's time to review your trust.

[REQUEST REPORT](#)



Malnutrition, which happens when the body does not get the nutrients it needs, is a major concern for seniors. Life-threatening malnutrition disproportionately affects those 85 and older. Recognizing malnutrition can help family members and caregivers know when to seek out medical care and assistance for their aging loved one.

Undernourished older adults can experience...

[READ MORE](#)

Are You a Member of a Group, Club or Organization Looking for a Dynamic Speaker?



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!

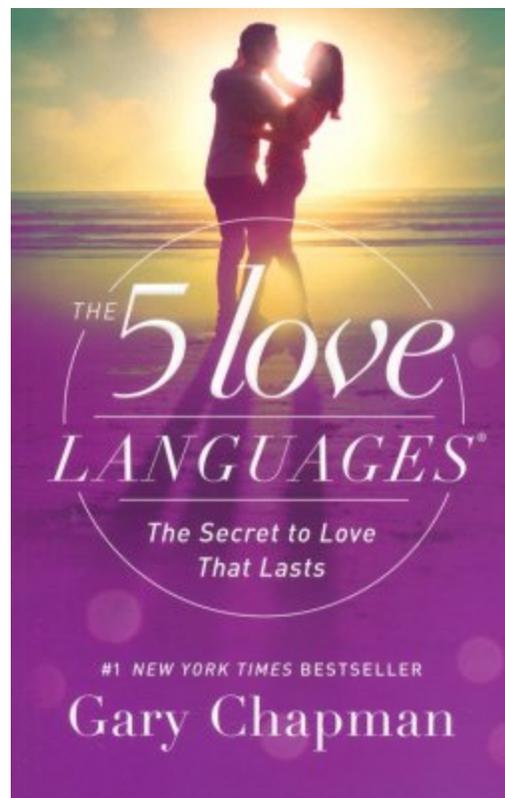
If you are a member of a group, club or organization, please reach out and let us know if they may have an interest in such a short presentation and we will

BOOK OF THE MONTH The 5 Love Languages: The Secret to Love That Lasts

In honor of Valentine's Day, we thought we'd share information about a book called "[The 5 Love Languages: The Secret to Love That Lasts](#)" by Gary Chapman. If you haven't heard about the 5 Love Languages, it's a compelling concept about how we "speak" love and what actions or ways we either express or prefer to receive love.

The 5 Love Languages:

- **Words of Affirmation**
- **Acts of Service**
- **Gifts**
- **Physical Touch**
- **Quality Time**



If you haven't taken the quiz to find out what your love language is, here's a link to a free online quiz to find out: [TAKE QUIZ](#)

There is no right or wrong love language. It's simply what ways you prefer to communicate your love in your life. The better you can understand your Love Language, as well as those of your spouse or significant other, the better you will be able to communicate your love to one another!

CLIENT TESTIMONIALS

"We made an appointment for the 3-year review of our trusts. The firm automatically provides a free meeting to evaluate a client's trust every 3 years. Peter Keon appeared promptly at the scheduled time. Peter has been our attorney for about 20 years. He is extremely knowledgeable and clearly

"I love working with Jane. She answers my questions even if she has answered them a couple of times before."
—Leila J.

"Great and courteous service. Ms Lee is a very knowledgeable attorney in the Living Trust field."

—Wing Y.

explains any suggestions he makes about the best approach for our trusts. He is friendly and easy to speak with. The firm is responsible for many innovations and makes them available to its clients. I would recommend the firm of Kavesh, Minor and Otis to anyone who is interested in setting up a trust.”
—Herbert P.



Thank you for these wonderful client reviews, Herbert, Leila and Wing (all 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!



QUOTES OF THE MONTH

"Have enough courage to trust love one more time and always one more time."

—Maya Angelou, American Memoirist, Poet, and Civil Rights Activist

"Lots of people want to ride with you in the limo, but what you want is someone who will take the bus with you when the limo breaks down."

—Oprah Winfrey, American Talk Show Host, Producer, Actress, Author, and Media Proprietor



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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Our mailing address is:

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