



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

Estate Planning Specialists
for your peace of mind®

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JUNE 2024 ISSUE

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The Beach Boys' Brian Wilson Placed Under Conservatorship Due to Mental Decline

by Attorney Philip J. Kavesh



Brian Wilson, the creative genius behind the iconic American rock band from the 60's (formed in Hawthorne, California!), has unfortunately been placed under a court-ordered conservatorship. Conservatorships, often known as guardianships in other states, are

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

THURSDAY June 6th

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

[REGISTER](#)

SATURDAY June 15th

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

[REGISTER](#)

TUESDAY June 25th

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

appointed by a judge who has determined that an individual is not capable of caring for themselves and/or their finances.

The conservatorship was appointed after it was determined by the court that Wilson, a Rock & Roll Hall of Fame Member, is suffering from dementia and is experiencing considerable decline from the disorder. Wilson's late wife, Melinda Ledbetter Wilson, who passed away on January 30, previously handled most of his affairs. This difficult decision to place Wilson under court-ordered conservatorship was made after his seven children, caregiver and doctors all were consulted before the petition was filed back in February. It was finally determined by the court that his publicist, Jean Sievers, will act as conservator with respect to his personal healthcare and living decisions, while his finances will continue to be managed by Lee Ann Hard, who serves as Trustee of Wilson's Living Trust.

How This Could Have Been Avoided

This court conservatorship proceeding no doubt cost a good deal of attorney fees, as well as stress and unwanted publicity for the family, and delays in his conservator stepping in to act. While this situation seems to have worked out in Wilson's favor...

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Father Becomes Grandfather

by Attorney Philip J. Kavesh

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FREE REPORT

WHY YOU SHOULD REVIEW YOUR ESTATE PLAN

The Law Firm of
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for your peace of mind

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 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



As we prepare to celebrate Father's Day later this month, I spent some time thinking about my own grandfather, my father, myself as a father, and now myself as a grandfather.

I have two children, boy and girl twins who are now 32 years old. Although I know that my personal story may not necessarily be true for all fathers turned grandfathers, I can honestly say that my experiences being a father and a grandfather are very different.

Being a Father

Fathering my two children was a challenge, because they were born when I was 39 and more than full-time busy pursuing my career goals as an attorney as well as building my law practice. I was so immersed in my work that I often got home late, after my kids had already gone to bed. All that work seemed worthwhile in that it provided a good standard of living for my family and allowed their mother to stay home and care for them. But, in retrospect, I wish I had spent more regular, daily time with my children.

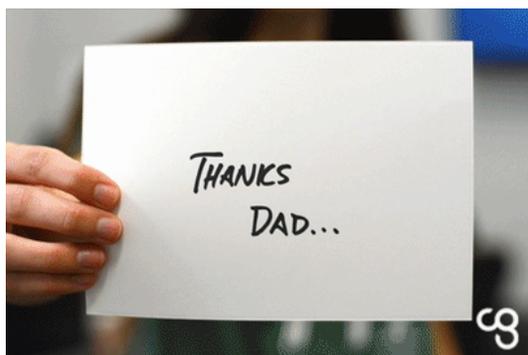
I did my best to attend my children's teacher's conferences, school recitals and sporting events. And I traveled, sometimes alone with them, on some great trips. However, I mainly was a weekend "good times" Dad. Looking back further, to when I was a kid, I realize it was much the same for my own busy father when I was growing up. I'm sure I learned from him the model of hard work and long hours during the week and fun times on the weekend. It's how he

an easy-to-follow-checklist to determine whether it's time to review your trust.

REQUEST REPORT

Happy Father's Day!

Sunday, June 16th is Father's Day. Wishing all of the fathers, grandfathers, stepfathers, and father figures out there a very Happy Father's Day!



showed our family he loved and cared for us. So, I followed suit.

I also learned from my Dad that being a father involves a delicate balancing act between enjoying your children and also being their parent. Teaching them right from wrong, morals and principles. At times, having to sometimes be the "bad guy" by enforcing the rules or saying no. Not always being their favorite person, but always having their back and being someone they can talk with and count on when needed. This has been the hardest part of being a father, particularly in their teenage years and, now even in their 30's.

Being a Grandfather

I am now blessed to have the privilege and honor of being a grandfather to my wife's grandkids, two boys ages 10 and 12. This experience as grandfather has been dramatically different for me.

First, I am...

[READ MORE](#)

RECIPE RECOMMENDATION Maine Lobster Rolls

June 15th is National Lobster Day and what better way to celebrate than with some delicious Main-Style Lobster Rolls. This is a simple and tasty recipe that is also fun to prepare along cold beers and good friends.

INGREDIENTS

- 1 pound cooked lobster meat (shelled, drained, and cooled)*
- 3-4 tablespoons mayonnaise (I use Hellmann's, Duke's, Cains, Stonewall Kitchen, or homemade)
- ¼ cup finely chopped celery (optional, for those who like a little "crunch")

- freshly-squeezed lemon juice (optional)
- kosher or sea salt and freshly-ground black pepper
- 4 large lettuce leaves (optional, I use Bibb)
- 4 split-top, flat-sided hotdog buns (“New England” style)
- 2 tablespoons unsalted butter , softened



DIRECTIONS

1. Remove and discard any stray bits of shell or cartilage from the lobster meat and cut it into large chunks (about $\frac{3}{4}$ -inch). Sometimes, you'll see the claw meat left whole, placed across the top of the roll for an impressive presentation.
2. In a bowl, gently toss lobster with 3 tablespoons mayonnaise and celery (if using). The lobster should be lightly-coated, but not weighed down by the mayonnaise. Add an additional tablespoon of mayonnaise, if needed.
3. Taste the lobster salad. Some brands of mayo are a bit tangier than others. If the salad needs more brightness, add a squeeze of fresh lemon juice. Season to taste with salt and pepper.
4. Cover the lobster salad and refrigerate for 30 minutes, or up to 6-8 hours if prepping ahead.
5. To assemble the lobster rolls, preheat a griddle over medium heat. Butter the flat sides of the hotdog buns and grill for just a couple of minutes per side, until toasted.
6. Place lettuce (if using) onto each bun and mound with $\frac{1}{4}$ of the lobster salad. Serve with your favorite sides, such as coleslaw, dill pickles, french fries, or kettle chips.

Enjoy!

CLIENT TESTIMONIALS

“Stable group that keeps up with current laws re estate planning. Jane Lee, Esq, is quick, knowledgeable, friendly

“We have used Kavesh, Minor & Otis for a few decades and the results have always been very good. The quality of their product seems extremely to

and insightful”
—C.S.



**the point. We would never use
another company for our
Living trust.”**
—Walter O.

**“Peter Keon is an excellent
estate planning attorney and
takes care of our Living Trust
as well as our IRA Inheritance
Trust. When I have questions,
I simply submit them by email,
and I get a prompt and
thorough response.”**
—Bruce B.

Thank you for these wonderful client reviews, C.S., Walter and Bruce (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!



QUOTE OF THE MONTH



"What makes a good father? A good father sets an example that his children want to follow. A good father provides for the needs of his children—both material and non-material. A good father demonstrates his love in both words and actions. A good father provides guidance in a positive fashion."

— Rob Kozak, "Finding Fatherhood"

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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