



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

Estate Planning Specialists
for your peace of mind®

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MARCH 2022 ISSUE

[Our Firm](#)

| [Resources](#)

| [Seminars](#)

| [FAQs](#)

| [Contact Us](#)

IN THIS ISSUE

NOTE: If any of these links are not working for you, [click here](#) to view this email in your browser.

MAIN ARTICLE:

[“Sorry, Kids, We Can’t Talk to You!”](#)

SECONDARY ARTICLE:

[Can Cataract Surgery Reduce Your Risk for Developing Dementia?](#)

FROM PENCE WEALTH MANAGEMENT:

[Financial & Market Updates](#)

[Sign Up for a FREE Living Trust Seminar](#)

[Client Testimonials](#)

RECIPE OF THE MONTH:

[Citrus Shrimp and Avocado Salad](#)

FREE DOWNLOAD:

[The Top 10 Estate Planning Mistakes People Make \(and How to Avoid Them!\)](#)

**“Sorry, Kids, We
Can’t Talk to You!”**
by Attorney Philip Kavesh



If your parent (or parents) created an estate plan with us, or spoke with us about getting one, you’re likely to run into an unanticipated roadblock someday when you contact us.

You may give us a call or send us an e-mail, asking to speak with your parent’s attorney. Maybe you’ll want

[Quote of the Month](#)

LIVING TRUST SEMINARS

These seminars are for the public and also for our existing clients who want to bring family or friends!

PLEASE NOTE:

Some of our seminars listed below are currently being held in-person. If you, or someone you know, would like to attend a virtual seminar instead, including any friends and family who might not live in the area, we also have some limited virtual seminars (noted below), or please [send us an e-mail](#) and we can book a private viewing of our seminar online.

(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
March 12th**

9:30am - 11:00am

Torrance Marriott Hotel
3635 Fashion Way

Extremely Limited Capacity

REGISTER

VIRTUAL LIVING TRUST SEMINAR

**TUESDAY
March 15th**

9:30am - 11:00am

Online Webinar

REGISTER

to assist your parent with the process of establishing or changing his or her estate plan. Maybe you'll want some information from our file, to assist your parent in some way, like with handling his or her financial matters. These are perfectly legitimate reasons why you may contact us.

Unfortunately, the answer you'll likely receive from us will be, "Sorry, we can't talk with you!" (Our answer may not be quite that brief or blunt, but that's what you're likely to hear.) And, if you insist on continuing to contact us, we may simply refuse to return your calls or e-mails. No doubt, your reaction will run the gamut from disappointment to shock, frustration, and even anger. Your reaction will seem warranted, since our behavior will have appeared to you as cold, unempathetic and unprofessional. In fact, however, we will be observing the highest professional standards - - and, believe it or not, may be acting for your benefit! Please permit me to explain.

We Only Serve One Client

As estate planning attorneys, we are bound by certain Rules of Professional Conduct (also known as "Ethics Rules"). While it's logical and understandable for you to believe that, as a child of our client, you may have an interest in your parent's estate plan and should therefore be able to be involved, these Ethics Rules may limit your involvement.

First, your parent, who engaged us and for whom an estate plan was

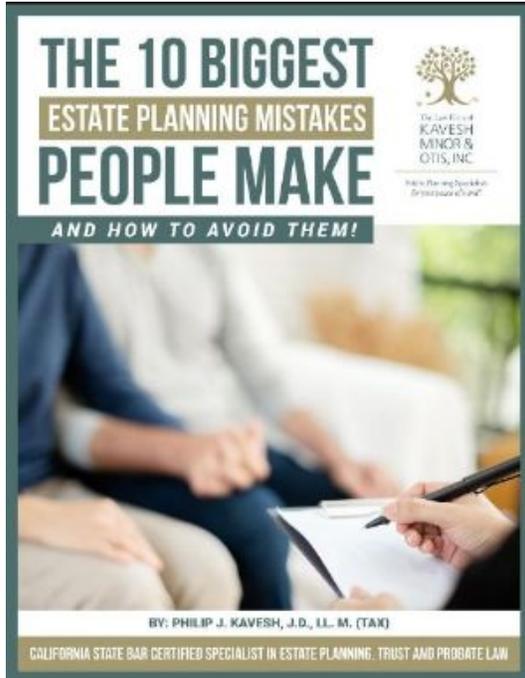


Share



Invite a Friend

FREE DOWNLOAD



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

created, is our only client. (If a parent becomes ill, disabled or deceased, then we may represent the person who then legally steps into the shoes of your parent, namely his or her agent under Power of Attorney, Executor of his or her Will and Successor Trustee of his or her Living Trust.) We owe to our client, your parent (or their legal representative), a number of inviolable professional duties.

The Duty of Confidentiality

Our applicable Ethics Rules require us to maintain as confidential all communications between our client and us, as well as all their asset and other information contained in our files, even including the client's estate plan documents. We are not permitted to reveal or discuss these confidential matters with any other party without the informed consent of our client, your parent (or a court order).

The client's informed consent cannot simply come to us in the form of a letter or e-mail, or even a phone call or Zoom meeting. We are obligated to first assess the client's legal capacity to grant informed consent. Typically, that requires a private, in-person meeting with your parent(s), at our office, where we can both verify there are no other possible distractions or influences present and fully evaluate the client's physical and mental state.

If and when we meet with your parent, to determine his or her legal ability to grant informed consent to the release of his or her confidential

relatives and property, as well as the actions you should take NOW to avoid future heartache.

[REQUEST A COPY](#)

**REMINDER:
WE ARE OPEN!**



As a reminder, our offices are now officially open for business for clients to come for in-person meetings. We have limited our visitor capacity and all the necessary safety precautions and protocols are in place at our premises to keep our clients and our staff safe. In addition, all of our attorneys and staff are fully vaccinated.

We know that virtual meetings have not been accessible or preferred by some and we are happy to be able to offer in-person meetings again. We will still have virtual meetings available for those who cannot or do not wish to come into the office at this time.

information, you should not attend that meeting. We'll come back to this issue later and explain the reason why. But, first, let's go over the other professional duties we owe to our client, your parent.

Duty to Protect the Interests and Independence of the Client

In particular, we are bound to avoid any potential negative or unlawful interference with our client's (your parent's) personal affairs, especially possible forms of physical or financial elder abuse. We also are duty bound to avoid any potential negative or unlawful interference by others with the terms of your parent(s)' estate plan, through what is commonly referred to as coercion or undue influence. Our role is to help assure your parent(s)' intentions, as expressed to us and set forth in their estate plan, are properly carried out.

Again, the most appropriate way for us to best safeguard the interests and independence of the client is to meet with him or her personally, alone in our office.

Now that you know these legal duties we owe to your parent(s), you may still have this burning question...

[READ ON](#)

Can Cataract Surgery Reduce Your Risk

for Developing Dementia?

According to a [recent study conducted by the University of Washington](#), adults who have undergone cataract surgery have shown to have a lower risk of developing dementia. This finding is expanding the medical field's understanding of the connection between brain health and the eyes.



For a memory loss disorder that does not have any known long-term treatment options or preventative methods, this discovery can potentially be significant to the quality of life of our aging seniors.

The study found that in adults over the age of 65 years old, nearly 30% had a lower risk of developing dementia for at least 10 years after cataract surgery, compared to those individuals who did not.

According to the lead researcher of the study, Dr. Cecilia Lee, the Klorfine Family associate professor of ophthalmology at UW School of Medicine, there are a couple of hypotheses that they believe to be the reason why this is the case. [READ ON](#)

Financial & Market Updates

Courtesy of

Pence Wealth Management



PENCE

WEALTH
MANAGEMENT

Thanks to the advisors at Pence Wealth Management, we are pleased to provide to you access to their Market Update and Insights entitled, "Pence Perspective: Commentary (Episode 3)". See below.



Addressing a Potential Conflict in Ukraine (as of February 16, 2022)



Markets have been moved in recent days on increasing tensions between the United States and Russia, with Western estimates of over 130,000 Russian troops positioned outside of Ukraine at time of writing. Bottom line is that we will get an answer on the Ukraine question soon. Temperatures in Kiev typically increase

quite a bit in March, melting snow in continental areas, which turns into mud and can make tank travel extremely difficult until the ground dries later on in the year. If Russia is to have a tactical advantage in the attack, they need to move before the thaw and their tanks get stuck in the mud.

Given Russia is claiming it is pulling back some of its troops, this increases the likelihood of at least a delay in terms of a conflict – however the potential for a mistake by either side still remains high in our view. We cannot take a position on the ultimate likelihood or impact of a conflict in Ukraine but note that, historically, armed conflicts have... [READ ON](#)

DISCLOSURE: The opinions voiced in this material are for general information only and are not intended to provide specific advice or recommendations for any individual. Historical performance is no guarantee of future results. All market indices are unmanaged and may not be invested into directly. The economic forecasts set forth may not develop as predicted and there can be no guarantee that strategies promoted will be successful. All investing involves risk including loss of principal. Pence Wealth Management does not provide legal and/or tax advice or services. Please consult your legal and/or tax advisor regarding your specific situation. E. Dryden Pence III and Laila Marshall-Pence are Registered Principals with LPL Financial. Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor. Member FINRA/SIPC. LPL Financial and Pence Wealth Management are separate entities.

RECIPE OF THE MONTH

Citrus Shrimp and Avocado Salad

This simple but totally flavorful shrimp salad makes the perfect meal-prep meal for lunch or dinner thanks to pan-seared citrus-flavored shrimp, creamy avocado, and the crunch of sliced almonds.



INGREDIENTS

- 1 pound medium Pan-Seared Citrus Shrimp, (I use 31/40 shrimp)
- 8 cups greens, (such as arugula, spinach, or spring mix)
- Fruity or lemon-flavored extra virgin olive oil
- Juice of 1/2 lemon or 1/2 orange
- 1 avocado, sliced or diced
- 1 shallot, minced
- 4 ounces sliced almonds , toasted
- Kosher salt and freshly ground black pepper

DIRECTIONS

1. Prepare the recipe for the Pan-Seared Citrus Shrimp, or gently warm the leftover shrimp. Or, if you prefer, serve the shrimp chilled.
2. Toss the shrimp with the salad greens in a large bowl.
3. Lightly drizzle with olive oil, and if desired, some of the sauce remaining from the shrimp with a generous squeeze of citrus, and toss lightly to coat.
4. Add the avocado, shallots and sliced almonds and then season with kosher salt and freshly ground black pepper and serve.

SOURCE: www.FoodieCrush.com

CLIENT TESTIMONIALS

"I chose this firm three years ago to handle my estate trust needs due to their longstanding reputation. I recently completed my complimentary 3-year review with Peter Keon and was impressed with the level of detail Peter went to ensure my personal intentions were currently represented in my trust and up to

"We just finished a video consultation with Miss Lee, on our Living Trust. She was very friendly, Professional and patient with my husband and I to explain the updates we need on our Living Trust since Laws have changed We couldn't be more pleased with her expertise advice."

date with IRS regulations. He was able to easily explain the legal terminology and I was completely satisfied at the end of my review."

—Pam

—Carmen & Antonio H.

"Jane has been working with us for a few years, and we appreciate her clarity of communicating legal matters to a lay person."

—Dan L.

Thank you for these wonderful client reviews!

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 have asked how they can continue to support us over the years and they do so by not only referring their friends and family, but another way you can help us is by taking the time to leave us an online review (if you haven't done so already). Below are a handful of websites you can choose from to leave a quick online review of your experience with our firm.

Thank you, in advance, for continuing to support us over the years! We look forward to continuing to help you and your loved ones for many more years to come!



QUOTE OF THE MONTH

"Remember that not getting what you want is sometimes a wonderful stroke of luck."

—Dalai Lama



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



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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