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

Estate Planning Specialists  
*for your peace of mind<sup>SM</sup>*

**1.800.756.5596**



**APRIL 2023 ISSUE**

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## Estate Planning Must-Do's BEFORE You Go on Vacation

by Attorney Philip Kavesh



As we head into summer in a few months and the kids (or grandkids) are now out of school for summer break, you may have already been thinking about or even booked a vacation. Whether you're going out

[Why Can't I Speak with My Parent's Attorney?](#)

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## 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**  
**April 6th**

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

**REGISTER**

**SATURDAY**  
**April 15th**

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

of town, out of state, or out of the country, there are always a lot of things to do before you leave.

From figuring out where you're going to stay, what activities you guys are going to do, what to pack and if there's anything else that you might need before then. Do this for one person, but then multiply it by the number of people in your family; it can be stressful and exhausting trying to manage all of this. The thought about estate planning probably has no consideration on this vacation To Do list. However, many travelers purchase travel insurance to protect their vacation investment in case of bad weather, medical emergencies, travel delays, or any other unpredictable circumstances. Just like travel insurance, estate planning is also the "insurance" for the unpredictable "what ifs" in life.

Here is a list of Estate Planning "Must-Do's" before going on vacation...

**READ MORE**

**FREE REPORT**

REGISTER

**WEDNESDAY**  
**April 26th**

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

REGISTER



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**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



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 how children may successfully overcome this apparent roadblock.

REQUEST REPORT

## Majority of Adult Children Cannot Support Boomer Parents

Courtesy of  
Elder Law Answers

A recent survey by the American Advisors Group (AAG) finds that 55% of adult children say they are not financially prepared to help their Baby Boomer parents cope with rising inflation and living expenses.

“Americans want to see their parents age with grace and dignity and have the resources they need to live comfortably, but for many families the current economy is making that difficult,” AAG Chief of Marketing Martin Lenoir said in a news release.

AAG surveyed more than 1,500 adult children, ages 40 to 55, across the country. Known as the “sandwich generation,” this group faces the responsibilities not only of raising their children, but also of serving as caregivers for their aging parents.



Among the survey’s other key findings... [READ ON](#)

## Financial & Market Update

Courtesy of  
Pence Wealth Management

With all of the changes happening in the financial markets these days, it can be challenging to stay on top of the latest news. This is why the advisors at Pence Wealth Management have put together podcasts and videos with a variety of important and relevant financial and market updates. Check out Episode 2 of Market Insights, a podcast series put together by Pence Wealth Management.



[LISTEN TO PODCAST](#)



**PENCE**

WEALTH  
MANAGEMENT

*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. Pence Wealth Management, Inc. ("PWM") is a financial services practice within LPL Financial LLC ("LPL Financial") comprised of multiple financial professionals that provide a series of services including personal investment advisory, third party managed advisory and brokerage services. PWM, LPL Financial, and Kavesh, Minor & Otis are separate entities.*

## RESTAURANT OF THE MONTH Nelson's Terranea

One hidden spot in the South Bay is Nelson's, located on Terranea Resort in Rancho Palos Verdes. Located cliffside, Nelson's is family-friendly and is the perfect spot to enjoy an afternoon and evening sunset.

This is a spot that Mr. Kavesh frequents with his mother. It's become one of their favorite dining experiences!

### **LOCATION**

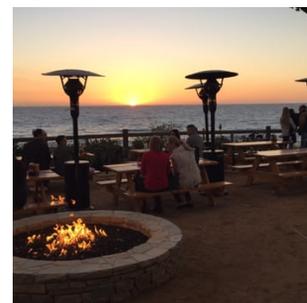
100 Terranea Way  
Rancho Palos Verdes, CA 90275  
Phone: 310.265.2836

[VIEW MENU](#)

### **HOURS OF OPERATION**

Sunday - Thursday  
11:00am - 8:00pm

Friday & Saturday  
11:00am - 10:00pm



There is valet parking available, along with shuttle service to take you through

Terranea property to Nelson's.

We hope you enjoy Nelson's as much as we do!



## CLIENT TESTIMONIALS

***“Kavesh, Minor & Otis were referred to me by a coworker. I went to one of their workshops on living trust and estate planning, and I learned a lot. Peter Keon was incredibly knowledgeable and professional as he guided me through the process. I strongly urge others to work with the Law Office of Kavesh, Minor & Otis for their estate planning and to create a living trust.”***

—Maria C.

***“We have dealt with Kavesh, Minor & Otis for almost 20 years and have found them to be knowledgeable, efficient and friendly. We wholeheartedly recommend them to anyone looking to establish a trust.”***

—Morris S.



***“My wife and I are truly happy about the work done on our Family Trust. Our lawyer, Jane Lee is just OUTSTANDING. We are looking forward to a long relationship. Our children are as well.”***

—Jim H.

***“Their office is highly knowledgeable on the subject of Living Trusts and related laws. They make continuous efforts to keep their clients living trusts up to date and notify them of updates that are needed to conform with the new laws and prevent future unexpected issues. I have attended their free Trust Seminars....very educational and informative. Their office personnel are courteous, friendly and responsive. I think Peter Keon and Phil Kavesh are the lawyers of choice when it comes to professional services in the subject of Living Trusts!”***

—Max R.

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 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

***“There are always flowers for those who want to see them.”***  
—Henri Matisse, Artist



***“A flower cannot blossom without sunshine and a man cannot live without love.”***  
—Max Müller, German Philologist

***“A flower does not think of competing with the flowers next to it. It just blooms.”***  
—Zenshin, Buddhist Monk

## REMINDER: IN-PERSON MEETINGS!

Now that COVID has subsided, most of our clients feel that their private estate planning matters are better discussed in-person, rather than over a Zoom meeting or by telephone. 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 still have virtual meetings available for those who cannot or do not wish to come into the office at this time.



## 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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