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

Estate Planning Specialists
for your peace of mind®

1.800.756.5596



AUGUST 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:

[What Happens When You Become Disabled?](#)

SECONDARY ARTICLE:

[Keep Your Emergency Contacts and Medical Information Updated for First Responders \(and Don't Forget, "What's in Your Wallet?"\)](#)

FINANCIAL PLANNING:

[Financial & Market Update](#)

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

[Client Testimonials](#)

RESTAURANT OF THE MONTH:

[The Depot in Torrance](#)

FREE DOWNLOAD:

What Happens When You Become Disabled?



A common question for many people is, what happens to your Living Trust (and your assets) if something were to happen to you and you become too disabled or ill to manage your own affairs? Who takes over then?

Answer: Your Successor Trustee

[Questions You Should Ask When Choosing an Estate Planner](#)

[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:

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
August 13th**

9:30am - 11:30am

Torrance Double Tree Hotel
21333 Hawthorne Blvd
Limited Capacity

[REGISTER](#)

**WEDNESDAY
August 24th**

9:30am - 11:30am

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

[REGISTER](#)

When you set up your Living Trust, you will be asked to name a Successor Trustee. This is a person (or persons) that you will appoint to step in when the time comes to help you manage your assets if and when something may happen to you. This may be your spouse, a child, some other person or a trust company. During your lifetime, *you* are the Trustee of your Living Trust. As the initial Trustee while you are living and able to act, you will have the rights and powers to control your assets, buy and sell real estate, and make decisions as you normally would if you owned your assets outright without a trust. It is essentially “business as usual”. When you become ill or disabled and unable to manage your own affairs, then your Successor Trustee will...

[READ ON](#)

**Keep Your
Emergency
Contacts and
Medical
Information
Updated for First
Responders
(and Don't Forget,
“What's in Your
Wallet?”)**

Courtesy of ElderLawAnswers with commentary from the Law Firm of Kavesh, Minor & Otis



Share



Invite a Friend

FREE DOWNLOAD



We Know How Hard It Can Be to Choose One Estate Planner from Another

That is why our founder, attorney Philip J. Kavesh, wrote *The Questions You Should Ask When Choosing Your Estate Planner*, a simplified but vital guide for evaluating estate planning service providers.

[REQUEST A COPY](#)

[READ ON](#)



If medical personnel are able to immediately access your medical history during an emergency, it could mean the difference between life and death. Unfortunately, if you are injured, in shock, suffering from dementia, or are otherwise incapacitated, you may not be able to provide that information yourself.

There are several systems readily available to help you make your crucial contact and medical history information available to first responders. Consider taking the time to check out and implement the following free tools...

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 with a variety of important and relevant financial and market updates. Take a listen below to their podcast from July 1st.



[LISTEN TO PODCAST](#)



To schedule a free consultation with one of our affiliated financial professionals, please call 1-800-731-3623.

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

The Depot

Have you ever been to The Depot restaurant in Torrance? It's a favorite of attorney, Phil Kavesh's, and many others in the KMO family.

Owned by Chef Michael Shafer, The Depot offers a wonderful and unique dining experience, with all kinds of food options. With a slightly Asian flare in the cuisine selection, The Depot is a fantastic spot for a date, corporate event, girls night out, or other celebration. [VIEW MENUS](#)

Chef Shafer also holds Cooking Classes and other fun, themed events at the restaurant!

Hours of Operation

Tuesday through Friday.

Lunch: 11am to 2pm

Happy Hour: 4pm to 7pm

Tuesday through Saturday.

Dinner: 5pm to 9pm

Closed on Sundays and Mondays

Address & Contact Info

1250 Cabrillo Avenue

Torrance, CA 90501

310.787.7501

www.depotrestaurant.com

Have you been to The Depot before? If so, please feel free to share with us your favorite dish! Also, if you have other favorite local restaurants, your restaurant selection may be featured in a future newsletter!



CLIENT TESTIMONIALS

"After my grandmother passed away in 2020, my mom was in need of her own estate plan. I recommended her to go to Kavesh, Minor & Otis and she met with Peter Keon. He addressed a lot of challenging and difficult issues we have with our very blended and complex family situation. His knowledge of what could happen down the line was so helpful. I am so relieved that

"Kavesh, Minor, and Otis prepared a trust for my mother, who recently passed away. My communication with Legal Assistant Shantadee Gadson has been the only bright spot since my mother's passing. She has a welcoming, understanding, yet uplifting quality to her when she speaks to you. While you may not contact Kavesh to speak with their legal assistants, if you are

my mom got this taken care of and am grateful that she got the guidance and help she needed. Our family cannot thank you enough!"
—Kristina S.

fortunate enough to get her on the phone, you are sure to feel much better once the call has ended. Kavesh, Minor, and Otis is a very reputable trust law firm but their best asset may very well be in the form of Shantadee Gadson. Thank you, Ms. Gadson."
—Kevin M.

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, 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 handful 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



*Life is too short... to hold grudges.
Life is too short... to lose friendships.
Life is too short... to hide who you are.
Life is too short... to live with regrets.
Life is too short... to be scared.
Life is too short... to shed tears.
Life is too short... to waste time.
Life is too short... to not be you.*

—Unknown

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.

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.