



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

Estate Planning Specialists
for your peace of mind®

1.800.756.5596



JULY 2022 ISSUE

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Hot Fun in the Summertime

by Attorney Philip J. Kavesh



A while back, I reminisced about my last summer of innocence, in 1964, when I was still a pre-teen and about to transition from the bliss of my elementary school life to the rat race

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 July 9th

9:30am - 11:30am
Torrance Marriott Hotel
3635 Fashion Way
Limited Capacity

[REGISTER](#)

WEDNESDAY July 13th

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

[REGISTER](#)

of junior high (see my prior article, [“Summertime and the Living Was Easy”](#)).

Here, I’ll fast forward to the summer of 1969, a time of great social and political upheaval, and my last true summer of fun with my neighborhood buddies (the next summer was more serious and somber as I said goodbye to everyone and prepared to leave town for college).

In that summer of ’69, one of the “top of the pop” songs was Sly and the Family Stone’s [“Hot Fun in the Summertime”](#). It was certainly a hot and humid summer, filled with violent protests in the city streets. But it was also filled with a lot of fun, most exemplified by the wild partying at a farm in Woodstock. For us neighborhood boys (“hoods”), most of whom were around age 17, it was more like Hot Mischievous in the Summertime! We had grown bored of the usual summer activities in our small, South Jersey town (from basketball at the YMCA, fishing trips at the local lake and streams, and golfing at nearby course for \$1 between 5pm and sunset, to basement dart throwing and card playing at night). We wanted some action - - and, unfortunately, we found it!

[READ ON](#)

Checklist for Detecting and Dealing with Elder Financial Abuse



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Invite a Friend

FREE DOWNLOAD

WHY YOU SHOULD REVIEW YOUR ESTATE PLAN

The Law Firm of
KAVESH MINOR & OTIS, INC.
*Estate Planning Specialists
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 when someone (or their spouse) becomes disabled or passes away. This is why our founding attorney Philip J. Kavesh created an easy-to-follow-



The elderly are particularly vulnerable to scams or to financial abuse by family members or others in need of money. Financial abuse can be very difficult to detect, but there are warning signs.

How to Detect Financial Elder Abuse

The following are some signs that an elderly loved one may be the victim of financial abuse:

- The disappearance of valuable objects.
- Withdrawals of large amounts of money, checks made out to cash, or low bank balances.
- A new "best friend" and isolation from other friends and family.
- Large credit card transactions.
- Signatures on checks look different.
- A name added to a bank account or joint accounts that are newly formed.
- Indications of fear of caregivers.

How to Help

If you suspect someone of being financially abused, there are several actions you can take:

checklist to determine whether it's time to review your trust.

REQUEST A COPY

HAPPY
INDEPENDENCE
DAY!



In observance of Independence Day, our office will be closed on Monday, July 4th. Our office will reopen for business on Tuesday, July 5th.

Wishing you and yours a safe, relaxing and "cool" holiday weekend! 😊

- Report the crime by calling your local Adult Protective Services and state attorney general's office.
- File a police report.
- Explore options at your local probate court if your state has such courts.
- The court can intervene if someone in the family is misusing a power of attorney or their role as guardian or conservator.
- Contact advocacy organizations. The National Center on Elder Abuse offers guidance on how to investigate and seek justice for elder abuse. State laws vary, but some have elder abuse statutes and may be able to get restitution for breach of fiduciary duties.
- Try to get a temporary restraining order from a court while building your case.

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 Daily Market Reports, which include what-you-need-to-know details every day in the U.S. Financial Markets, U.S. Economy and Politics, Europe and the World, as well as a look at some random facts about historical events for each day!

[VIEW DAILY MARKET REPORTS](#)



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.

RECIPE OF THE MONTH

Peach, Tomato & Corn Arugula Pasta Salad

Delicious peach, tomato & corn arugula pasta salad made with juicy ripe peaches, cherry tomatoes, feta and sweet corn. This easy vegetarian peach pasta salad is tossed with just olive oil and fresh lemon juice for a light, flavorful salad that's perfect for lunch, parties & picnics!

INGREDIENTS

- 8 ounces fusilli or bowtie pasta (regular, whole grain or gluten free will work)
- 2-3 tablespoons extra virgin olive oil
- 1 lemon, juiced
- 1/2 teaspoon sea salt, plus more to taste
- Lot of freshly ground salt and pepper

- 1/4 teaspoon of red pepper flakes
- 4 ounces crumbled feta or sub goat cheese (about ¾ cup)
- 2 large ripe peaches, sliced
- 1 pint cherry tomatoes, halved (I love using heirloom cherry tomatoes for color variety!)
- 1 cup raw corn off the cob (or you can use thawed frozen corn or canned)
- ½ medium red onion, thinly sliced
- 5 ounces baby arugula (about 6 packed cups of arugula)
- **Optional:** Quartered salami and avocado (makes leftovers last longer and adds texture to the salad!) -- add as much as you'd like!



DIRECTIONS

1. Bring a large pot of water to a boil and add a little salt. Once water boils, add the pasta and cook until al dente, about 7-9 minutes. Drain pasta, reserving a few tablespoons of water for later. Place pasta in large bowl.
2. In a small bowl, whisk together the olive oil, lemon juice, salt, pepper and red pepper flakes until well combined. Pour the dressing over warm pasta and add a little reserved pasta water to help keep the pasta moist and non-sticky. Immediately add feta and gently give the pasta a toss.
3. Next add in the peach slices, cherry tomatoes, corn, red onion and arugula. Toss to combine. Taste and add more olive oil, lemon juice, salt and/or pepper, if necessary. Great warm or cold. Serves 6.

Note: This arugula pasta salad will stay fresh covered in the fridge for about 3-4 days. It's delicious made ahead of time, too, so feel free to prep it the night before a picnic or bbq, or prep it for your weekday lunches.

SOURCE: www.ambitiouskitchen.com

CLIENT TESTIMONIALS

"Several years ago the law firm of Kavesh, Minor & Otis, Inc. assisted us in developing our wills and other legal documents. It was time to revisit and make changes to these documents and the firm was very helpful in making these adjustments. Very pleased with our attorney who guided us through the process."

—Jim L.

"We went to see Peter Keon to have a will and trust done. He made us feel comfortable in a relaxed atmosphere. When we went back to sign papers, he was very thorough in explaining everything and answered any questions we had. Our experience was excellent."

—Darlene C.

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!



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.

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