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

Estate Planning Specialists  
*for your peace of mind®*

**1.800.756.5596**



**MAY 2023 ISSUE**

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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

**SATURDAY  
May 6th**

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

**REGISTER**

You may know that I go alone on an annual pilgrimage to Major League Baseball spring training in Florida. (That's me in the middle of the photo, taken at Baycare Ballpark in Clearwater, Florida). I'd like to share a little history of how this annual ritual came about.

This all began as I was about to relocate back to California, having left in 1995 to attend law school in Philadelphia and then work for two years. It was the spring of 2000 and I had some time off in between my last job and my move. I learned that Mardi Gras was happening, so I thought, well, I'll take a trip down to New Orleans. And because my parents owned a place at the time in Plantation, Florida, I also thought, well, if I go down to Mardi Gras, maybe I'll skip on over to Florida too. So as I was making these plans, I'm reading the paper every morning, including the sports section and found out MLB spring training was starting in Florida at the same time. I realized I could go to Mardi Gras, go to spring training and visit with my parents all within a week or so. I had never thought about baseball spring training at all. Exhibition games don't matter. Who really cares about spring training?

### My Love for Baseball Grew From There

The deep truth that was revealed to me that first spring training was that, I always loved baseball. I played baseball when I was a kid almost all the time at school, in the neighborhood and then Little League and, of course, I loved watching

**WEDNESDAY**  
**May 10th**

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

[REGISTER](#)

**THURSDAY**  
**May 25th**

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

[REGISTER](#)

**SPECIAL TRUSTEE SEMINAR**

**SATURDAY**  
**May 13th**

10am to 11:30am  
Torrance Marriott Hotel  
3635 Fashion Way  
Light Refreshments

[REGISTER](#)



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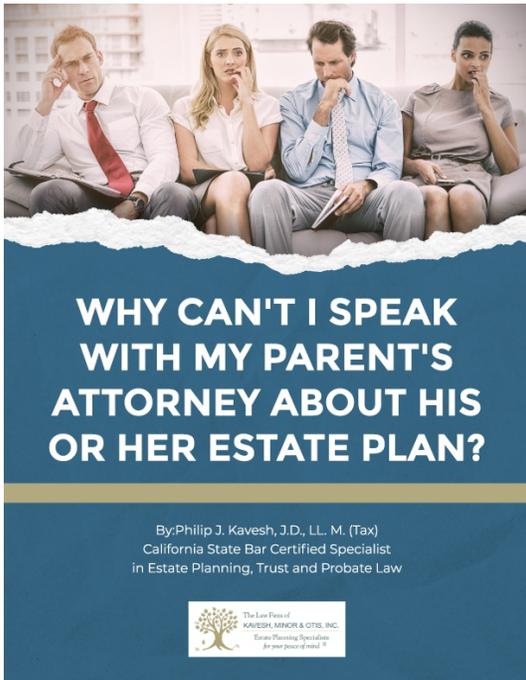
Invite a Friend

[FREE REPORT](#)

baseball games growing up. I went to a lot of Phillies games in Philadelphia with my Dad. We had season tickets for Sunday games and we enjoyed going together. So, the idea of seeing my Dad and attending a few games with him in Florida, even meaningless pre-season ones, seemed like it would be a lot of fun.

My love for baseball grew, right away, at my first spring training trip. What I noticed immediately was how small the ballparks were. I could catch one of the star players and I could get him to autograph a ball for me. There were only maybe 5 or 6 thousand people in the crowd. It's sparsely populated, which enables an intimacy you don't experience at a regular season game. I could walk right down to the field before and even during a game, talk to my idols and get their autographs.

Besides the unique intimacy of spring training, I noticed I could see two games in a day in different cities with different teams! Many were played during the day, unlike the regular season. I could be in Tampa, Florida for a 1:00pm game, leave at 3:30pm, get in the car and drive over to Clearwater, which is not that far away, and see a night game starting at 6pm. I could do that with Bradenton and Clearwater, Dunedin and Clearwater or Dunedin and Tampa. Or I could go further down to Port Charlotte or to Fort Myers. It was an amazing experience to be able to see a "double header". But it really wasn't a double header in the usual sense, where you usually watch the same teams in the same



The estate planning process is generally perceived by parents and their loved ones as a "family affair". Often times, adult children help their parents put together the necessary paperwork to bring to the attorney meeting, take them to the meeting, and even want to participate in the meeting.

**However, the attorney-client relationship with the parents is a unique one that has particular confidentiality and other limitations which the attorney is bound by and must adhere to.**

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](#)

park, but rather different teams in different cities and different parks. That was even better than a double feature at the movies as a kid!

(By the way, there's an even bigger Phillies fan than me - - their mascot called the "Phillie Phanatic". I was able to capture a photo of him waving at me!)



**This Year's Trip Was a Little Different**

This year, I planned things a little differently. My father became ill around Thanksgiving and, while he is okay and is now recovering following surgery, I decided to...

[READ MORE](#)

## ANOTHER ESTATE PLANNING CELEBRITY HORROR STORY:

### Lisa Marie Presley (and Her Father, Elvis Presley)

Lisa Marie Presley, daughter of the late famous singer, Elvis Presley, passed away in January 2023 of cardiac arrest at the age of 54. Like many other celebrities, Lisa Marie's estate is now unfolding much like a dramatic soap opera between her mother, Priscilla, and Lisa Marie's children.



Lisa Marie did have a revocable Living Trust which originally named Priscilla and her business manager as co-trustees. However, shortly following Lisa Marie's funeral service, Priscilla filed a petition with the court against the estate, challenging a 2016 amendment which removed her and her business manager as trustees. This amendment named her two eldest children, Riley and Benjamin Keough (who passed away in 2020) as trustees. Priscilla is claiming that she was never notified of this change and questioned the validity of the amendment. According to Priscilla, the 2016 amendment does not appear to have witnesses, there was a misspelling of her name and it was never given to the previous trustees for review.

While Lisa Marie and her mother have had a strained relationship in recent years, there are certain requirements by the California Probate Court to make changes to estate plans valid. The fact that there may not even be an attorney who could back up the validity of this amendment to Lisa Marie's estate plan would suggest that she perhaps made these changes on her own and expected the court to uphold her wishes. For all the court knows, the children made the change and it was not actually a valid change. That's what the court needs to decide.

All of this drama and court proceedings could have been easily avoided with proper... [READ ON](#)

## SPECIAL SEMINAR

**Will Your Loved Ones Know  
What to Do With Your Living Trust  
When You Are Disabled or Gone?**

If you've named a child, relative or friend to be in charge as your "Successor Trustee" when you're disabled or pass away, they probably have no idea of what they'll need to do! Unfortunately...

**What Your Successor Trustee Doesn't Know Could Cost Your Family  
Hundreds of Thousands of Dollars!  
(not to mention Cause Lots of Family Conflict!)**

And you could be placed at risk, if an unprepared Successor Trustee steps in when you're sick or disabled, when you most need them to take proper care of you and your assets!

Your Successor Trustee needs to know how to:

- Properly carry out the legal duties owed to your beneficiaries (which your Trustee may be unaware of!)
- Work together with any Co-Trustees, as well as your beneficiaries, to avoid conflicts and resolve disputes
- Access your funds immediately when the time comes and pay bills
- Maintain proper accounting and avoid an IRS audit
- Get paid appropriate compensation and be reimbursed for reasonable expenses
- Avoid many other pitfalls for the unwary that could expose the Trustee to liability out of his or her own pocket - - even if he or she is smart, responsible and good with money!

You'll also learn what you may need to do to keep your Living Trust estate plan properly up to date.

You and Your Successor Trustee Should Attend...

**A FREE Special Presentation Exclusively for Living Trust Owners  
and Their Successor Trustees**

**"The ABC's of Successfully Acting  
as Successor Trustee"**

Our seminar speaker, attorney Peter Keon, is a State Bar Certified Specialist in Estate Planning, Trust and Probate Law and has personally handled hundreds of Living Trusts after people have been disabled or passed away. He'll show you and your Successor Trustee what to do and what not to do, based on over 20 years of his real-world experience and wisdom!

We only present this seminar a few times a year, so please arrange your calendar to attend and make sure your Successor Trustee comes too, if at all possible.

**Saturday, May 13th**  
10am to 11:30am  
Torrance Marriott Hotel  
3635 Fashion Way  
Light Refreshments

REGISTER

**Seating will be Limited so Reserve Your Seats Right Away  
Call NOW 1-800-756-5596 (24 Hours)!**

*(By the way, if you are a client of ours and have not come in for a free checkup meeting in the past 3 years, please also schedule your appointment when you call.)*



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## 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 3 of Market Insights, a podcast series put together by Pence Wealth Management.



LISTEN TO PODCAST

**Congratulations, Laila!**

Congratulations to Laila Pence of Pence Wealth Management for recently being recognized by *Barron's Advisor* as one of the Top 1,200 Advisors in the country for 2023 and by *Forbes* as the #5 of 2023's Top Woman Wealth Advisors in the Nation!



**Will the Volatile  
Economy and Stock Market  
Wreck Your Retirement?**

You hear so much negative news from the media - - War, Inflation, Rising Interest Rates, and a Volatile Stock Market. How can you make sense of all of it and properly protect your financial future?



Many clients have asked us these questions. That's why we have arranged a very special presentation by a nationally recognized expert on the economy and markets, Dryden Pence. Mr. Pence has over 30 years of financial industry experience and is a frequent TV guest on Fox News, Bloomberg and CNBC. He is also the Chief Investment Officer of one of Barron's Top 100 Private Wealth Management Teams.

If you ever wanted someone to help explain - - in plain English - - what is really going on, this is your chance. Come and learn what is happening now, what is ahead, and how one of America's top investment managers is navigating through it all.

**WEDNESDAY**  
**May 24th**  
10:00am to 11:30am  
Torrance Main Office  
990 W. 190th Street, Suite 500  
Extremely Limited Capacity

**REGISTER NOW**

*Can't make this date? Call us at 1-800-756-5596 and ask about the next one!*

*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

## Baked Strawberry Cream Cheese Stuffed French Toast

If there's one brunch recipe you need in your life, it's this Baked Strawberry Cream Cheese Stuffed French Toast, and what better time to present it than Mother's Day. Not only is this French toast easy to prepare, but it's always a favorite.

### **INGREDIENTS**

- 8 ounces cream cheese, at room temperature
- 1 loaf challah bread sliced into 1 1/2 inch thick slices
- 1 jar (10 ounces) strawberry jam
- 6 large eggs
- 2 cups whole milk
- 2 teaspoons honey
- 4 tablespoons salted butter, melted
- 1 tablespoon vanilla extract
- kosher salt
- maple syrup, for serving

### ***Strawberries***

- 2 cups fresh strawberries
- 1/4 cup honey
- 2 teaspoons lemon juice

### **DIRECTIONS**

1. Grease a 9x13 inch-baking dish with butter.
2. In a bowl, whip the cream cheese until fluffy, 1-2 minutes.
3. Slice each piece of bread in half, cutting almost all the way through, but leaving a 1/4 inch at the bottom. Spread the inside of the bread with cream cheese, then jam, press to enclose (see above photo). You will only need 2/3 of the jam.
4. In a large bowl, whisk together the eggs, milk, butter, vanilla, and salt. Submerge each piece of bread into the egg mix, allowing the bread to sit at least a minute to soak up the eggs. Arrange the bread in the baking dish. Pour the remaining egg mix over the bread slices. Cover and place



- in the fridge for 30 minutes or overnight.
5. When ready to bake, preheat the oven to 375° F. Cover with foil and bake for 25 minutes. Remove the foil and bake another 20-25 minutes or until the French toast is golden.
  6. Toss the fresh strawberries with the honey and lemon.
  7. Serve the french toast warm, topped with any additional whipped cream, strawberries, and maple syrup. Enjoy!

ENJOY!!

Source: [Half Baked Harvest](#)

## CLIENT TESTIMONIALS

***“Jane Lee was prepared and very informative. She told us of the new laws and did not try to persuade us into new endeavors that were not necessary.”***

—Carol C.

***“My wife and I recently had our Revocable Living Trust done by attorney Peter Keon. He explained in detail what he was doing in a professional way, and he answered patiently all our questions, sometimes twice because English is our second language. We feel that we can rest assured that we went to the right place because this is the specialty of Kavesh Minor and Otis and they have been doing it for a long time.”***

—Manuel M.

***“We have been clients of the law firm of Kavesh for many years. Phil is an outstanding lawyer, a specialist in his field and we feel, indeed, fortunate to have found him. We have also dealt with Peter Keon. We have found him to be knowledgeable, efficient, very time-managed, follow-through and is, also, kind-hearted in how he relates to us. He talks with us rather than down to us. He relates to us in a humanistic, kind, caring, warm compassionate way, which we absolutely value. Peter keeps his promise- this is what I call integrity. And, character counts because we count character!”***

—C.S..



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

*“I don’t want to get to the end of my life and find that I lived just the length of it. I want to have lived the width of it as well.”*

—Diane Ackerman, American Poet & Author

*“Live your best, act your best, and think your best each day, for there may be no tomorrows.”*

—Unknown



## 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



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*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.*