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

Estate Planning Specialists
for your peace of mind®

1.800.756.5596



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How to Make Sure Your Parents' Estate Plan (or Yours) Will Work as Intended

By Attorney, Philip Kavesh



Although we do our best to

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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

**WEDNESDAY,
March 4th**

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

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SATURDAY,

plans are properly designed, drafted, maintained and administered, things can still go wrong -- usually because a few simple steps were overlooked by clients, despite our reminders.

The good news is that most of these problems are preventable. Here's...

A Practical Checklist

1. Make Sure All Assets Are Properly Titled in the Living Trust. Assets outside the Trust may wind up in a Court Conservatorship (if someone becomes incapacitated or incompetent) or a Court Probate (when he or she passes away).

Be sure to:

- Transfer assets properly into the Trust after signing it
- Update beneficiary designations where appropriate.

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Trust after the plan is created.

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**THURSDAY,
 March 26th**
 9:30am - 11:30am
 Torrance Main Office
 990 W. 190th Street
 Suite 500 (5th Floor)
 Extremely Limited Capacity

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Invite a Friend

FREE REPORT

Most people feel a weight has

**SENIOR ALERT:
 Free Dementia Care
 Resources at Local
 Libraries**



Takeaways

- Libraries nationwide are becoming valuable, free resources for people living with dementia and their caregivers, offering support beyond traditional books.
- Key offerings often include memory kits, educational courses on caregiving and well-being, and memory cafés.
- Many libraries are

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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 if you (or your spouse) becomes disabled or passes away. This is why our founding attorney Philip J. Kavesh created an easy-to-follow checklist to determine whether it's time to review your trust.

[DOWNLOAD REPORT](#)

adopting "dementia-friendly" practices, including specialized staff training and accessible physical spaces, to better serve this community.

While local libraries are best known for their books, many are expanding their role to meet evolving community needs, including support for people affected by dementia. According to Columbia University, one in 10 Americans aged 65 and older is living with dementia, and an additional 22 percent have mild cognitive impairment. In response, many libraries across the country are working to make free, practical dementia care resources more widely available.

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CELEBRITY ESTATE NEWS: Tony Bennett's Family Sings the Blues

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After the death of legendary singer Tony Bennett in 2023, disagreements arose among family members over how his trust and estate were being handled. Lawsuits followed, with allegations of poor communication, lack of transparency, and conflicts of interest by the person in charge of administering the trust.

While every family is different, the issues being raised in this case are surprisingly common—and they offer some important lessons for all of us.

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**RESTAURANT RECOMMENDATION:
JOEY MANHATTAN BEACH**

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Located just minutes from the shoreline, JOEY Manhattan Beach brings a vibrant, upscale energy to the South Bay dining scene. The space blends modern design with a warm, welcoming atmosphere, making it ideal for everything from sunset happy hours to celebratory dinners. With its lively bar, stylish dining room, and inviting patio, it's a destination that feels both elevated and effortlessly coastal.

Signature dishes keep guests coming back, including the hand-held Sushi Cones, the tender, perfectly cooked Filet Mignon, and the flavorful Szechuan Chicken Lettuce Wraps. For something indulgent, the Steak & Ravioli

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Bianco is a standout, while handcrafted cocktails and a curated wine list round out the experience. Whether you're stopping in after a beach day or planning a night out, JOEY delivers bold flavors in a polished yet relaxed setting.

**LOCATION:**

3120 N. Sepulveda Blvd
Manhattan Beach, CA 90266

HOURS:

MON - SUN: 11:00 AM - 12:00
AM

HAPPY HOUR:

DAILY: 3:00 PM - 6:00 PM
SUN - THURS: 9:00 PM -
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CLIENT TESTIMONIALS

"Mom and Dad used Kavesh, Minor & Otis in the late 80's for their estate planning. Mom passed in 2008 and dad passed in 2025. My brother and I contacted the law firm after being frustrated trying to deal with the situation by ourselves. MAN was it worth the call! Eight months later and we are almost done! Attorney Jane Lee is amazing! Love her for her patience. And Tammy and Jacqueline on the support staff are some of the best people I've ever done business with. Efficient is an under statement ! Responsive beyond belief! Thank you again to Jane, Tammy and Jacqueline for all the help and you will be highly recommended."

—Paul G.

"I had a positive experience managing my Executor role for my Uncle Tony's estate. Working with Tammy Ng over several months, I found her unfailingly kind, understanding of my delinquent responses, helpful, brief, and delightful. I would strongly recommend working with this firm and ask for Tammy."

—Thomas M.

"Peter was very helping especially working to accommodate our schedule. Through helping with our planning, covering a lot of options we had not considered. He also provided a training session also very helpful."

—Dorothy S.

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THANK YOU!

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Thank you for these wonderful client reviews (all from real clients!). 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!



QUOTE OF THE MONTH

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"We find in life exactly
what we put into it."

- RALPH WALDO EMERSON

OFFICE LOCATIONS

MAIN OFFICE

TORRANCE

990 W. 190th Street, Suite 500
Torrance, CA 90502

TELEPHONE NUMBER

1.800.756.5596

OTHER LOCAL OFFICES

(BY APPOINTMENT ONLY)

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.

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