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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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SEPTEMBER 2025 ISSUE

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By Attorney,
Philip Kavesh**



**When setting up a Living Trust,
one of the most important**

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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,
September 3rd**

9:30am - 11:30am

Torrance Main Office

990 W. 190th Street

Suite 500 (5th Floor)

Extremely Limited Capacity

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**SATURDAY,
September 13th**

decisions you'll make is choosing a trustee – the person or entity who will eventually carry out your wishes, manage your assets, and make distributions for the benefit of your beneficiaries. We talked about this in our previous article, [“Avoid the Common Mistakes When Choosing a Successor Trustee.”](#)

And some readers asked for more detailed guidance on how to choose a Professional Trustee.

While many people choose a family member or a friend to act when they're disabled or gone, there are times when it's better to appoint a Professional Trustee. This might be an individual licensed as a professional fiduciary or a Corporate Trustee, like a bank or trust company.

Here's what you need to know when deciding if a Professional Trustee is right for you and how to choose one wisely...

[READ MORE](#)

**SENIOR ALERT:
"Oh, No! Where's
My Social Security**

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

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**TUESDAY,
 September 23rd**

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

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SPECIAL SEMINAR

Save the Date

Does Your Successor Trustee Know What to Do When the Time Comes?

This special seminar, only held once or twice a year, is designed for clients to invite their successor trustee named in their living trust, so he or she will know what to do when the time comes for them to act!

IN-PERSON TRUSTEE SEMINAR

**SATURDAY,
 October 18th**

10:00am - 11:30am

Check?" Action Required by September 30



Starting September 30, 2025, the Social Security Administration (SSA) will stop issuing paper checks for benefits payments. The SSA is urging all recipients of Social Security, Supplemental Security Income (SSI), and other government benefits to switch to electronic payments before the deadline. This change is part of the federal government's ongoing effort to improve efficiency, reduce costs, and combat fraud.

Beneficiaries who do not switch to electronic payments by the September 30 deadline and who do not qualify for a paper check exemption may experience delays or interruptions in their benefits payments.

Electronic Payment Options

The SSA offers two main options for receiving benefits electronically:

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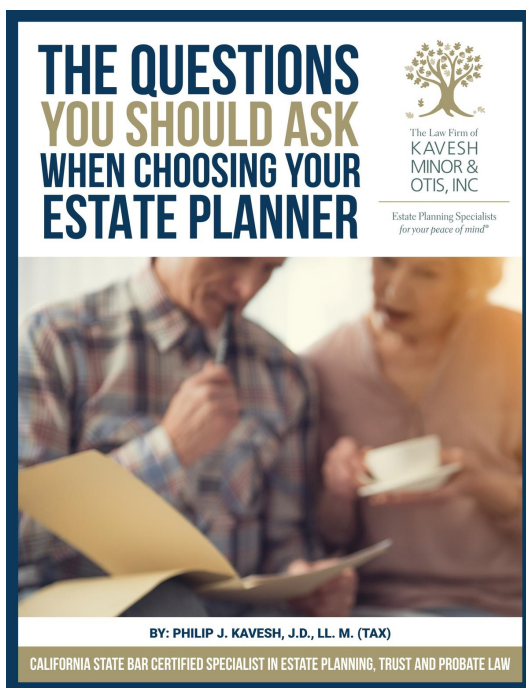
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FREE REPORT



If you have begun the estate planning process, you may have found that it can quickly become overwhelming. Even if you are familiar with the terms and designations in your documents, you have no way of knowing whether the choices you make are the best course of action for you and your family.

Of course, there are professionals who specialize in estate planning, and each one brings different experiences and knowledge to the table. So whom do you trust with the

Celebrity Estate Lessons: Heath Ledger and Chadwick Boseman



When we think of celebrities, we often imagine red carpets, movie premiers, and glamorous lifestyles – not probate court battles. Yet, even rich and famous actors can leave behind estate planning mistakes that create unnecessary stress for their loved ones.

Two examples – the estates of Heath Ledger and Chadwick Boseman – offer important lessons for all of us, regardless of fame and fortune. Here's what happened, and how a well-prepared estate plan could have prevented the problems.

Heath Ledger: An Outdated Will

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biggest decisions of your life—the ones that could continue to have an effect on your loved ones for years into the future?

We Know How Hard It Can Be to Place Your Trust in a Stranger

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

[DOWNLOAD REPORT](#)

Actor Heath Ledger starred in films such as *10 Things I Hate About You* and *Brokeback Mountain* and won an Oscar for his portrayal of the Joker in *The Dark Knight*. Unfortunately, he tragically passed away at just 28 years old. He left behind a Will – but it was several years out of date. The Will named his parents and sisters as beneficiaries, but it had been signed before the birth of his daughter, Matilda, with actress Michelle Williams.

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**RECIPE RECOMMENDATION:
BAKED BRIE BITES WITH FIGS AND
PROSCIUTTO**

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These **Baked Brie Bites with Figs and Prosciutto** are a simple yet sophisticated appetizer that's perfect for entertaining. Each bite combines the rich creaminess of melted Brie, the sweet depth of fig jam, and the savory crunch of crisped prosciutto—all tucked into a flaky phyllo shell and finished with a juicy piece of fresh fig. They're easy to assemble, bake in just 10 minutes, and make a stunning addition to any holiday spread, wine night, or dinner party. Elegant, flavorful, and bite-sized, they're guaranteed to impress with minimal effort.

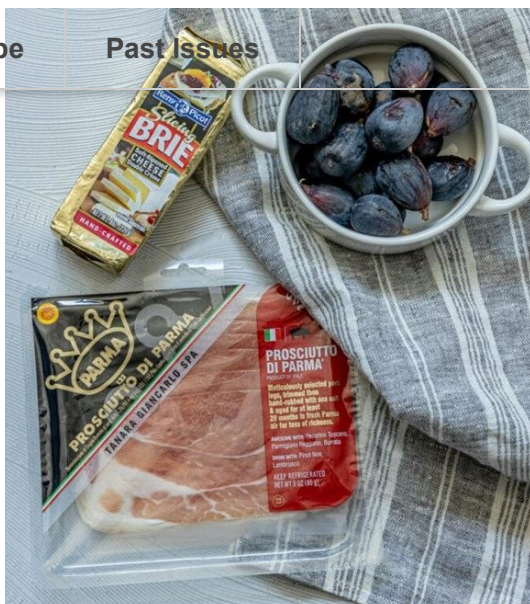
INGREDIENTS

- 8 oz Brie (rind removed, cut into 24 cubes ~ $\frac{3}{4}$ -inch)
- 2 oz Prosciutto di Parma (sliced into $\frac{1}{4}$ -inch ribbons)
- 24 Phyllo shells (defrosted)
- 4 tbsp Fig jam (divided evenly among shells)
- 3 large Fresh figs (cut into 24 pieces)

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DIRECTIONS

1. **Preheat oven** to 350°F and line a baking sheet with parchment paper.
2. **Prepare Brie:** Remove and discard rind. Cut Brie into 24 cubes (~ $\frac{3}{4}$ -inch each).
3. **Prepare Prosciutto:** Stack, roll, and slice into $\frac{1}{4}$ -inch ribbons.
4. **Assemble bites:**
5. Place phyllo shells on the prepared baking sheet.
6. Spoon ~ $\frac{1}{2}$ tsp fig jam into each shell and gently spread.
7. Add a cube of Brie to each shell.
8. Top with a few ribbons of prosciutto.
9. **Bake** for 8–10 minutes, until Brie is melted and prosciutto is crisp.
10. **Prepare figs** while baking: Cut each fig into 8 pieces (cut in half, then each half into quarters).
11. **Finish:** Remove bites from oven and top each with a fig piece.

Serve warm and enjoy!

Source: [Striped Spatula](#).

CLIENT TESTIMONIALS

"Kavesh, Minor & Otis were referred to me by a co-worker. I went to one of their workshops on living trust and estate planning, and I learned a lot. Peter Keon was incredibly knowledgeable and

" Attorney Jane Lee from Kavesh, Minor & Otis is the best trust Attorney. She helped me create my trust in I think 2018 and every three years I have been going back to their office for the review

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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.

"Top estate planning law firm. Follow with you and keep your family trust up to date, do not create trust and leave you. Highly recommend for family trust. My lawyer has been with me entire time and knows what to do to protect your assets to give to your family as you decide. And nobody knows but you."

—Jon D.

review everything and got all updates done. Everyone should go see her for all of your Attorney needs."

—M&M T.R.



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!

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QUOTE OF THE MONTH



OFFICE LOCATIONS

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

NEWPORT BEACH OFFICE

5000 Birch Street, Suite 8000

5850 Canoga Avenue, 4th Floor
Woodland Hills, CA 91367

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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