



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

Estate Planning Specialists  
*for your peace of mind®*

**1.800.756.5596**



**MAY 2021 ISSUE**

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## LIVING TRUST

## Mother's Day Reflections

by Arlyn Villanueva,  
Director of Operations &  
Estate Planning Paralegal

If you've been a client with us for some time, you have probably seen or met Arlyn at some point while at the office. Arlyn has been working for our law firm now for almost 27 years. She began working at the law firm as a marketing assistant and helped send out mail for our seminars and make client appointments. She since has evolved into one of our senior estate planning paralegals (helping draft and make changes to our client's estate planning documents) and for over the past 14 years has served as the Director of Operations, managing the firm and making sure that the staff and attorneys have what they need to do their jobs.

Arlyn is also a mother and took the time for us to interview her for Mother's Day.

## 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 are currently being held virtually, over the internet. When you register below, you will be sent a personalized link via email.*

*Since we are offering these as virtual seminars, we encourage you to consider inviting friends and family who might not live in the area and who can join us remotely! (We can provide services to anyone residing in California without them having to travel to our offices.)*

### LIVING TRUST SEMINARS

**WEDNESDAY**  
**May 5th**

9:30am - 11:00am  
Held Virtually

[REGISTER](#)

**SATURDAY**  
**May 8th**

9:30am - 11:00am  
Held Virtually

[REGISTER](#)

**THURSDAY**  
**May 13th**

9:30am - 11:00am  
Held Virtually

[REGISTER](#)

**TUESDAY**  
**May 25th**

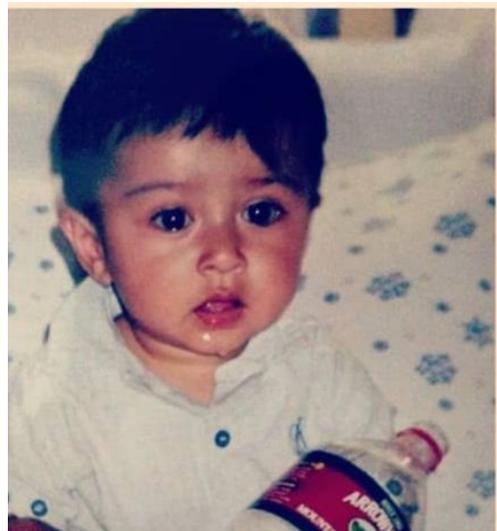
9:30am - 11:00am  
Held Virtually

[REGISTER](#)

Enjoy!

#### **Have you always wanted to be a mom?**

*Yes. I wanted a big family actually, because it was always just me and my brother. I have a big extended family and I saw cousins that all had sisters and would think how nice it would be to be a girl and have sisters or a boy and have brothers. I wanted that for my children, but it didn't work out that way and I just had my son, Nathaniel, when I was 27. Despite some attempts, I was unable to have more kids.*



#### **Do you feel that motherhood changed you?**

*Oh, absolutely. It immediately made me feel this sense of obligation to be responsible, to work hard and to provide for my family. I was constantly thinking in terms of how to provide for my son and also ensuring that I was in a position that if something happened to his father that I was capable of taking care of him. Perhaps that came from my exposure at an estate planning law firm? I'm not sure. But, my life changed in terms of what I did with my spare time. All of my spare time was for him, whether it was running around for his traveling hockey team and all of his games and practices, or school*



Share



Invite a Friend

**FREE DOWNLOAD**



Many people mistakenly believe that getting their estate plan is a "one and done" process—but it's not. Your and your beneficiaries' circumstances, needs, relationships, assets, and more change all of the time. This is why we bring in all of our clients every three years for a complimentary review meeting.

Download this FREE report to learn more about the reasons you should have your estate plan reviewed.

**REQUEST REPORT**

or whatever else was going on with him.

**What surprised you the most about being a mother?**

*I think the biggest surprise for me about being a mother was immediately and constantly having someone to always be worrying about. It creates this natural maternal instinct to protect him and I would like to say that it's gone away now that he's 21 years old and on his own, but it really doesn't.*



**Finally, do you have any advice for new moms?**

*I would say that everyone is different in their personality and how they want to raise their kids. People will offer lots of advice of what is "right" or what worked for them, but I would say that you should experience motherhood on your own terms and how you want to. I didn't always take the advice given to me and I don't regret any of it. Oh and one more thing...definitely get some sleep before the baby comes!*

**The Film 'I Care a Lot' Highlights**

## Vulnerabilities in the Guardianship System

Netflix's popular new movie, *I Care a Lot*, may be far-fetched in a lot of ways, but it does highlight some real weaknesses in the guardianship system that make it possible for an unscrupulous guardian to take control of an elderly person's life and bleed their resources dry. Fortunately, steps can be taken to avoid the guardianship system and the kind of nightmare the film portrays.



A guardian is someone appointed by a court to make decisions on behalf of an incapacitated individual ("ward"). The guardianship process usually starts when a family member or social worker notifies the court that someone can't take care of him- or herself. The court often appoints a family member as guardian. However, if the family can't agree on a guardian or there is no family to act as guardian, the court may appoint a public guardian. Public guardians are supposedly neutral individuals who are hired to act in the ward's best interest.

*I Care a Lot* follows one such public guardian who exploits the system to gain control of her wards' estates. The guardian, Marla Grayson, typically petitions for an "emergency guardianship" without notifying the ward. In the case that takes up most of the film, Marla appears on the doorstep of a very surprised Jennifer Peterson with a court order declaring Peterson incompetent (she is nothing of the sort) and forcing her to relocate to a long-term care facility. Marla has already arranged for Jennifer's doctor to declare Jennifer incompetent, and Marla also has a deal with a long-term care provider to admit Jennifer to his facility. And because it is an emergency guardianship, Jennifer is not required to be notified to appear in court to defend herself... [READ ON](#)

*EDITOR'S NOTE: This popular Netflix movie highlights the potential disasters (even if they do seem farfetched) that can happen with Guardianships. This can be prevented and avoided with a properly drafted Living Trust and related supporting documents.*

## FINANCIAL & MARKET UPDATE

Courtesy of

Pence Wealth Management



**PENCE**

WEALTH  
MANAGEMENT

Thanks to the advisors at Pence Wealth Management, we are pleased to provide to you access to their

Market Update and Insights (Season 2 Episode 2) and a special video entitled, "The Tale of Two Halves: Government Stimulus vs. Pent Up Consumer Demand". See below.



## The Tale of Two Halves: Government Stimulus vs. Pent Up Consumer Demand



*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. LPL Financial and Pence Wealth Management are separate entities.*

## RECIPE OF THE MONTH

### Refreshing Peach Salad

This simple and delicious Peach Salad is loaded with texture and flavor. Quick to make with fresh ingredients, it's a perfect meal for Mother's Day Lunch!

## **INGREDIENTS**

- 3 cups spinach slightly chopped
- 3 large peaches sliced
- 1 avocado sliced
- ¼ cup crumbled feta cheese
- 2 tablespoons chopped pecans
- ¼ cup fresh basil leaves

## **Dressing**

- ¼ cup olive oil
- 2 tablespoons red wine vinegar
- 1 tablespoon honey
- ¼ teaspoon salt
- ¼ teaspoon black pepper



## **DIRECTIONS**

- To make the dressing, whisk together the olive oil, red wine vinegar, honey, salt and pepper.
- Create a bed of spinach in a large salad bowl. Add the sliced peaches and sliced avocados on top. Sprinkle with feta cheese and pecans. Pour the dressing over the salad and top with fresh torn basil.

ENJOY!!

SOURCE: [Feel Good Foodie](#)

## **CLIENT TESTIMONIALS**

***We have worked with Kavesh for many years and have been totally satisfied with all they have done. Their work ethic is extremely positive, their staff is friendly and efficient, and their result is above expectation. Jane Lee has been our provider and she has done a wonderful job both for my husband and me.***

— Inga C.

***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***

***Attorney Peter Keon has provided us with comprehensive services with regard to our family trust, our IRA trust and a trust to protect our son. We couldn't be more pleased with his expertise and his service. Once our family trust was established, we received free reviews every 3 years to be certain that our circumstances have not changed and to bring our documents into compliance with any changes in the law.***

— Morris S.

***Everyone was very professional and very responsive. Jane Lee was unflappable. She has heard it all.***

***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 my mom got this taken care of and am grateful that she got the guidance and help she needed. Thank you!***

— Kristina S.

***Somehow you can discuss death-and-taxes without feeling like you are discussing death or taxes. I highly recommend Jane Lee and the entire Firm.***

— Elaine T.

Thanks to all of our clients for supporting us over the years. 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.

If you can take a moment to leave us an online review at any of the following websites, we would greatly appreciate it:



**HAPPY MOTHERS DAY!**



**Mother's Day is Sunday, May 9th.**

We just wanted to take the time to wish all of the mothers, grandmothers, aunts, stepmoms, and mother figures a very Happy Mother's Day!

## OFFICE LOCATIONS

For your convenience, we have multiple office locations throughout Southern California.

**NOTE: COVID-19 restrictions prevent us from meeting 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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