The Questions to Ask When Choosing A Torrance and Surrounding South Bay Cities Living Trust Administration Attorney

☐ 1. Do They Specialize in Trust Administration?

- All three attorneys of Kavesh, Minor, and Otis, Inc. ("KMO") are California State Bar Certified Specialists in Estate Planning, Trust and Probate Law. They have a combined over 60 years of experience as Specialists.
- Two of KMO's attorneys also have Master's Degrees in Tax Law. They are knowledgeable in not only trust and estate income tax, and estate tax, but California property tax. And the complex tax issues relating to IRAs and retirement plans.

☐ 2. How Many Trust Administrations Have They Handled?

- During KMO's more than 45 years serving Torrance, the surrounding South Bay Cities and greater Southern California, they have handled over 4,000 Trust Administrations (after the trust maker has passed).
- When a Probate is required, KMO handles that as well and is often able to avoid lengthy and costly Probate proceedings through a one-time court petition and appearance.
- KMO has successfully filed over 1,000 Estate Tax Returns and has an outstanding record with the IRS

☐ 3. Do You Know Exactly What it Will Cost, Up Front?

- All KMO's Trust Administrations are billed on a fixed fee basis, quoted at your initial meeting and agreed to, by you, in writing before any work is done. KMO doesn't give you an estimate or ask for a "blank check" and bill you by the hour.

see the next page...

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- There are no hidden extra fees (for copies, postage, staff or paralegal time, etc.).
- A fixed fee encourages your attorney to work more efficiently and quickly. Most KMO administrations are completed within 4 to 6 months.

☐ 4. Do They Help You Handle All the Key Tasks Involved?

- Gather asset information and valuations from third parties on your behalf.
- Spot and correct tax issues which others may miss, such as potential property tax reassessment and added income tax and capital gains tax on beneficiaries.
- Adjust the original estate plan for beneficiaries whose needs or circumstances may have changed and require more protection from third parties. Often, KMO can do this without the delays and expense of going to court.
- On completion, get you a signed Settlement Agreement and Receipt of Distribution from each beneficiary to help avoid later claims against you.
- KMO does all the above and more to help protect you, the Trustee, from potential personal liability out of your own pocket.

☐ 5. Are They Recognized as Leaders in the Field?

- KMO has spoken before the *National Network of Estate Planning Attorneys*, Wea*lth Counsel* and *The American Academy of Estate Planning Attorneys*.
- KMO has been quoted in the *Wall Street Journal* and *Los Angeles Times*.
- KMO regularly trains other trust and estate attorneys from all over the country.

☐ 6. Do They Have a Dedicated Team of Support Staff?

- So someone is available to you as an immediate point of contact, when the attorney isn't, and you can get answers and help when you need them.

see the next page...

- KMO has a separate Trust Administration Department consisting of 2 highly experienced paralegals and 3 assistants.

☐ 7. Do They Provide Educational Resources to Make the Process Easier for You?

- At the very start, KMO provides you with a plain-English Trustee Manual, with step-by-step checklists, to make sure you know what your duties and legal obligations are and to help guide you through the entire process --- knowledgeably, properly and timely.
- KMO provides other educational materials, such as Trustee guides and seminars.
- These help you understand the process, and avoid mistakes and personal liability.

Tip: Don't just compare fees --- compare value. A skilled, responsive, and specialized Trust Administration Attorney may save you (and the beneficiaries) far more in time, stress, taxes, and potential legal disputes than a "cheaper" option.

Let's Help You Do It Right And Enjoy Peace of Mind

Schedule a Free Initial Attorney Consultation, if You Qualify.

And Get an Exact Fee Quote at Your Meeting.

To determine if you qualify,

Call [800-756-5596] Email [info@kaveshlaw.com]

The statements here are in part factual and in part the opinions of the Law Firm of Kavesh Minor & Otis, Inc. and there are no legal or regulatory requirements that an attorney meet all these criteria in order to properly administer your trust. This is not legal advice.

The Law Firm of
KAVESH
MINOR &
OTIS, INC

Estate Planning Specialists
for your peace of mind®

DISCLAIMER

This Checklist is intended to offer general information only and does not create a client – attorney relationship with the Law Firm of Kavesh, Minor & Otis. The Checklist is based on California law at the time of printing. If you reside outside of California or own assets outside of California, the laws affecting you may differ. Also, keep in mind that laws periodically change and you should consult the most current laws before making any important trust administration decisions. This Checklist reflects the professional opinion of Kavesh, Minor and Otis, Inc. and it may not be necessary for you to implement every trust administration recommendation made in the Checklist. You should consult with a qualified attorney before making any important trust administration decisions or implementing any of the ideas discussed here.