



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

Estate Planning Specialists
for your peace of mind®

THROUGHOUT LOS ANGELES & ORANGE COUNTY

1.800.756.5596



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KMO!

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Living Trust Seminars

For the public and also for our
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family or friends!

Saturday, Oct. 13th

9am to 11:30am

Torrance Marriott
Breakfast Seminar

REGISTER 

Happy Birthday, KMO!

This month, our law firm
celebrates its 31st
birthday!

How time does fly. We
started out in 1981 with
just one client and over
the years have grown to
become one of the
largest estate planning
firms in all of California - - and the entire nation!



We'd like to personally thank each and every one of our clients,
without whom we could never have accomplished this great
achievement!

Where Are They Now?

(The First in a Series of Stories to Come)

By Attorney Philip J. Kavesh, President

As we reflect back over the 31
years of our phenomenal firm
history, many individuals were
instrumental to our growth and
success. None perhaps more so
than Jacklyn Meehan.

If you ever met "Jackie", you'll
surely remember her! Jackie has
one of those big, outgoing,
gregarious, warm personalities - -
and sense of humor - - you simply
cannot forget!



Thursday, Nov. 8th
9:30am to 11:30am
Main Torrance Office
Light Refreshments

REGISTER ▶

Saturday, Nov. 10th
9am to 11:30am
Torrance DoubleTree
Breakfast Seminar

REGISTER ▶

Tuesday, Nov. 13th
6:30pm to 8:30pm
Main Torrance Office
Light Refreshments

REGISTER ▶

Saturday, Nov. 24th
9am to 11:30am
Torrance DoubleTree
Breakfast Seminar

REGISTER ▶

**View Our Living Trust
Seminar Preview**



This is a sample of our monthly e-mail newsletter. To sign up to receive our newsletter, go to www.kaveshlaw.com or call 1-800-756-5596.

You may or may not know that Jackie worked with the firm for many years as a paralegal, helping countless families set up their Living Trust or administer it after a loved one passed. What you probably don't know is how she came to the firm, what her contribution really was toward building it...and what she's up to now!

I remember how, in the late 1980's, I'd finally gotten the hang of seminars and attracting new clients to our door. But that blessing soon felt like a curse when I realized I then had to get all the new work out the door! I had only one secretary/word processor to help me and she and I were swamped!

Quite a First Impression

So, I decided to place an ad for an experienced estate planning paralegal. One of the first candidates to reply was Jackie and she won me over right away!

I immediately felt a personal affinity with Jackie. She and I had both grown up in and around Philadelphia and spent our summers at the Jersey shore, so we had lots in common. But more impressive than her strong Philly accent was how Jackie demonstrated her "take charge" attitude from the very start, at her interview. She let me know in no uncertain terms exactly how much her salary would be (and not a penny less) and that she would work for exactly 10 years (and not a day more)!

Initially, I cringed when I realized the salary she demanded was more than I was making! But, I looked at her over 15 years of experience at a major bank's trust department and decided to borrow some money and take the chance -- one of my best investments in the firm ever, as it turned out. (And, by the way, yes, she did come to me 10 years later, to the day, and promptly retired!)

Jackie was a "go-getter" and, soon after she was hired, she took on for herself a much larger role than merely a paralegal doing paperwork. She met personally with many clients and, in her own inimitable style, developed lots of new business as her happy clients referred their family and friends. However, it was behind the scenes -- where she took command as our office manager -- that Jackie left her greatest legacy.

Jackie's Favorite Expressions

One of her favorite "guiding rules" was "the first time you do something, you're an amateur, but the second time you better be an expert!". In other words, she put into practice the belief that for every task there should always be a checklist, a form, a procedure, a system! That way, the next time she, me or

Client Review Seminar

This is a seminar for our existing clients who have not been in for their free 3-year review meeting, so they may hear about all of the changes in laws, planning technology and services that we now offer.

Wednesday, Oct. 17th

6:30pm to 8:30pm

Main Torrance Office
Light Refreshments

REGISTER 

Wednesday, Nov. 7th

6:30pm to 8:30pm

Main Torrance Office
Light Refreshments

REGISTER 

Wednesday, Nov. 14th

10am to 12pm

Main Torrance Office
Light Refreshments

REGISTER 

To reserve your seat at one of our seminars, simply click the "REGISTER" link under the event you wish to attend or you may also call us at 1-800-756-5596 or [e-mail us](#).

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anyone else in the firm did something, the quality of the result would be consistently high.

Another one of Jackie's favorite expressions was "the easiest and most efficient way to get things done is the right way!" We didn't get bogged down with lots of bureaucratic forms and procedures. Instead, she consistently refined our systems through trial and error until they became simpler, easier and quicker to use.

Jackie's remarkable systems covered everything from scripts for answering the phones, to client questionnaires, to attorney training programs, to client meeting checklists, to legal document forms, to internal department procedures. Thanks to her systems we were able to streamline our work while maintaining the highest quality. Better yet, that efficiency translated into modest, fixed fees for our clients. (At the time, this set us apart from other lawyers who instead asked for a "blank check" to be paid by the hour, because they couldn't consistently and accurately estimate the work time involved, like we could. In fact, over the years, attorneys from across the country have purchased our various forms and systems in order to duplicate our more client-friendly practice model!)

Jackie's systems also allowed us to hire and train great attorneys and staff over the years. Two of our current key firm members were personally hired and trained by her and now have been with us for over 20 years! Jackie brought aboard Elaine Anderson, originally as a word processor, and now Elaine not only puts together most of our estate plans as our senior paralegal, but trains and supervises our attorneys. One of Jackie's other "protégés", Arlyn Villanueva, initially started off in the mail room and is now our other planning paralegal and also handles the daily office administration and supervision of our staff. As Jackie would say (borrowed from the old David Carradine television show), "Well done, grasshoppers!"

The Fun Side of Jackie

Don't get me wrong. Everything wasn't always serious business with Jackie. The great power Jackie had in getting others to "buy in" to her systems and high work ethic was her charming, prodding and, at times, wacky sense of humor.

Jackie's funny way of looking at life -- and herself -- became evident right from day one. Jackie began with the firm at age 40 and, although she did own a car, she had never driven one! Her car was a big, red Dodge with a sporty convertible top (but little horsepower) that she had purchased from an elderly bank customer of hers who only drove it on Sundays! Jackie had to

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learn to drive for the first time in order to get to our office and everyone could plainly see how anxious she was, with her seat pulled up close to the steering wheel, her head peering over it and her hands gripping it tightly! The reason we could plainly see her was she always drove with the top down! She said this gave her greater visibility, with no blind spots. But she kept the top down even when it rained...and the staff thought it was a riot when, on a rainy day, she would come in late, soaking wet (but always cheery)!

I wish I could remember more of those, what I call, "Jackie moments". (I'm sure my staff can share a few, but may not be willing to divulge them!).

I do vividly remember one "Jackie moment", because it happened so frequently! I would be meeting with a client in my office, which shared a common wall with Jackie's and, all of a sudden, diplomas hanging behind me would start to rattle and shake. The clients would then ask in shock, "Are we having an earthquake?" Not exactly. It was just that Jackie always got louder and more impassioned when completing a plan with a client! So, my response to the client in front of me was, rather matter-of-factly, "No earthquake. It's just Jackie closing a case."

I also remember the early days of the firm, in particularly all the hard-working late-nights at the office (so we could meet payroll that week!). Jackie would host Domino's Pizza parties where we swapped bad jokes while we wolfed down our "health food"!

One of the stranger "Jackie moments" I recall occurred when the LAPD had its infamous O.J. Simpson car chase. At that time, Jackie's office overlooked the 405 freeway and she hurriedly told everyone in the firm to stop work and run into her office -- to watch the white Bronco pass by!

So, Where Is She Now?

Sorry, I almost wandered off too far with my storytelling.

For the first 10 years after she retired from our firm, Jackie relaxed in the dream home she and her husband constructed at Stephenson Ranch, near his work at Lockheed (and she occasionally took on some paralegal work for a local attorney when she wasn't overseeing improvements or redecorating!). Once her husband retired too, they decided to move back closer to their Philly roots, to a small historic town near the Jersey shore known as Cape May Courthouse.

I recently spoke and reminisced with Jackie, just after she

returned from her local beach on an 80 degree October day! Ironically, she said the biggest thing she misses about Southern California is the weather, but she's happy she traded it for an acre of woods and a big home in New Jersey she could never afford here! Plus, she "lives with the cold" by taking off 2 months each winter to enjoy her vacation home on Anna Maria Island off the west coast of Florida, near Sarasota! When she's not relaxing at the beach or going boating, she cares for her 92-year-old mother who lives nearby in Jersey, volunteers at the Red Cross and hosts a big annual speedboat racing event known as "Hydrofest"! (Check it out at www.wildwoodshydrofest.com).

Thanks again, Jackie, for all you've contributed to Kavesh, Minor & Otis and our clients. Enjoy a retirement well-earned!

(P.S. If you have a good Jackie Meehan story, please e-mail it to me at phil.kavesh@kaveshlaw.com.)

October 15th-19th: National Estate Planning Awareness Week

Did you know that October 15th through the 19th is National Estate Planning Awareness week?

Estate Planning is a very proactive type of planning that, unfortunately, many people put off until it is too late. However, for those of you who have already completed your estate planning (congratulations!), you can help us spread the word about the importance of others who you know doing this planning now.

Invite a friend, relative, co-worker or neighbor to attend one of our free upcoming Living Trust seminars (even if they have an estate plan, so they can keep it properly up-to-date). To see a schedule, [click here](#). Or, forward this e-mail newsletter to them.



Recent Blog Entries

Here are the latest blog entries for your reading pleasure!

- [Living Trusts Are NOT Just for the Elderly](#)
- [Wills vs Living Trusts: What's the](#)



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[Difference and Which One is Right for Me?](#)

- [Seniors Reminded to Beware of Scams and Report Elder Abuse](#)
- [The Terrible Cost of Not Having an Estate Plan](#)
- [And Much More!](#)

Did you know that each blog entry has the option for you to leave a comment? We welcome your comments and feedback on our blog entries. Also, if you have any particular articles or topics that you would like to see featured in our blog, please let us know! Thanks, in advance, and we look forward to hearing back from you!

Meet a Member of the KM&O Family: Thomas L. McKenzie, Esq. Of Counsel Attorney

Tom McKenzie is an expert in the area of Medicaid/Medi-Cal, Elder Law, Special Needs Planning and Long-Term Care Planning. Over the years, he has assisted many of our clients that require these specialized types of planning, particularly clients that have entered or may soon need to enter a nursing home facility.



Mr. McKenzie is an active member of the National Academy of Elder Law Attorneys and was the past Chairman of the Elder Law Section of the Orange County Bar.

Mr. McKenzie has written numerous articles for various publications and legal periodicals, including the Los Angeles and San Francisco Daily Journals, the National Academy of Elder Law Attorneys' NAELANEWS, the Gilfix Elderlaw Newsletter, the Leisure World News and the Orange County Bar Association's Elder Law Section Newsletter. He frequently lectures on estate planning, elder law, Medi-Cal, and long-term care planning issues. Mr. McKenzie has also been an expert panelist on programs sponsored by Continuing Education of the Bar (University of California), Orange County Bar Association, and California Advocates for Nursing Home Reform.

If you or a family member or friend needs assistance with Medicaid/Medi-Cal, Elder Law, Long-Term Care or Special Needs Planning and would like to arrange a free initial consultation with Mr. McKenzie, please call our office at 1-800-756-5596.

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