



Protecting Your Child's Inheritance

August 2017

The majority of trusts provide for an outright distribution of assets to children upon a certain age, which means that after you pass away, your child (if he or she is a beneficiary) will inherit your estate directly - but without any protections. Unfortunately, that outright distribution may be jeopardized if the child is ever involved in a lawsuit, bankruptcy, or a divorce.



Through proper planning, you can provide for your child's inheritance to be held in a Lifetime Protection Trust for him or her, where your child would be able to control, manage and spend the assets however they desire, but their creditors and spouses would be unable to reach those assets. This type of planning is ideal for those who wish to afford extra protection to their loved ones and ensure that their hard-earned assets won't become the subject of a lawsuit or a nasty divorce battle. Regardless of the size of your estate, your life's earnings are too important to leave unprotected.

Contact the *Law Office of James F. Roberts & Associates* at (714) 282-7488 today to discuss how we can implement this type of planning into your current estate plan.

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August Fun DIY Craft

Create a fun, unique planter that's easy to move around to create the perfect look outside or inside for fall!

- Crate (available at craft stores)
- Paint and brushes (color of your choice)
- Casters for the base of the planter
- Screws and a drill (to attach the casters)
- Small uniquely shaped chalk board
- Flowers in pots to go in the planter

Putting this together and is a fun afternoon and provides a great center piece to any entrance way with a great welcome sign.



Honeyed Pears in Puff Pastry



Ingredients:

- 4 small pears
- 4 cups water
- 2 cups sugar
- 1 cup honey
- 1 small lemon, halved
- 3 cinnamon sticks (3 inches)
- 6 to 8 whole cloves
- 1 vanilla bean
- 1 sheet frozen puff pastry, thawed

Instructions:

1. Core pears from bottom, leaving stems intact. Peel pears; cut 1/4 in. from the bottom of each to level if necessary.
2. In a large saucepan, combine the water, sugar, honey, lemon halves, cinnamon and cloves. Split vanilla bean and scrape seeds; add bean and seeds to sugar mixture. Bring to a boil. Reduce heat; place pears on their sides in saucepan and poach, uncovered, for 18-22 minutes or until pears are almost tender, basting occasionally with poaching liquid.
3. Remove pears with a slotted spoon; cool slightly. Strain and reserve 1-1/2 cups poaching liquid; set aside.
4. Unfold puff pastry on a lightly floured surface. Cut into 1/2-in.-wide strips. Starting at the bottom of a pear, wrap a pastry strip around pear, adding additional strips until pear is completely wrapped in pastry. Repeat with remaining pears and puff pastry.
5. Transfer to a parchment-lined 15-in. x 10-in. x 1-in. baking pan. Bake at 400° for 20-25 minutes or until golden brown.
6. Meanwhile bring reserved poaching liquid to a boil; cook until liquid is thick and syrupy, about 10-15 minutes. Place pears on dessert plates and drizzle with syrup. Serve warm. Yield: 4 servings.

<http://inspiredreamer.com/honeyed-pears-in-puff-pastry/>

Safeguarding Your Estate Planning Documents

Our clients often ask us if they should keep their original estate planning documents in a safe or safe deposit box. While that would be the most cautious route to take, it would also be effective to keep the documents in a safe place inside your home where your loved ones can locate it.

We will strive to keep an electronic copy of your documents on file for as long as possible, but it's always best to let your successor trustees and/or children know where you keep your original documents in the event they should need to use those documents one day. We always provide you with an additional hard copy of your estate plan so that you can give that to your successor trustees, or keep it in another location in case you misplace your originals.



There is no right or wrong answer in terms of how you maintain your original documents - as long as you are prudent and use reasonable care in how you store them. Those documents are intended to serve and protect you during your lifetime if you should lose capacity, and allow for the seamless transition of your assets to your loved ones after you pass away – it's important to keep them somewhere that can be located or, at the very minimum, to share the location of the documents with your successor trustees.

Ready for Back to School?

With all the excitement that back to school time brings, it also reminds us that we need to get all our planning and organization updated. Often we don't realize all the things that have taken place since the last time we thought about our estate plans. What a busy time of year! Making a little time to set up an appointment to go over your current estate plan and make sure that things are up to date is a great way to give you piece of mind heading into the hectic holiday season that is just around the corner! Call us today to set up your appointment to review your estate plan.



Next Monthly Seminar will be in August 2017

This month we will not have a monthly seminar! Each month, we usually conduct a free seminar designed to teach about the benefits of creating an estate plan.

The seminars are held on-site at our Anaheim office inside of our "classroom". We offer light snacks and refreshments to the attendees and the group is often

small and intimate, which allows for questions to be asked comfortably and for a very relaxed environment. Please encourage your loved ones to attend the seminar so that they may learn more about the estate planning process and benefits.

We will have another seminar in August! Keep an eye on your email for the exact date and time! Please share with family and friends to help others know they are prepared financially for the future!



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