



What Happens to My Pets When I Die?

August 2018

For many of our clients, their pets are among their dearest possessions and the relationship that they have with their pets is important enough to warrant special planning through their living trust to provide for those pets after the owner has passed away. At The Law Office of James F. Roberts & Associates, APC., we understand the desire to want to provide for these lovable and furry friends. We do this through the creation of a “Pet Trust”, whereby your existing living trust is amended to include special provisions for the care, support and maintenance of your pet(s) after your death.

The Pet Trust generally includes provisions such as:

- (1) a sum of money to be set aside for the care of the pet;
- (2) a designated caregiver, or a list of individuals nominated in a particular order to serve as caregiver, for the pet;
- (3) the types of pet-related expenses you would like the money to be used for; and
- (4) what happens to the balance of the Pet Trust fund upon the death of the pet.

If a Pet Trust is something you or a loved one would be interested in, please contact our office at (714) 282-7488 to discuss a pet trust with an estate planning attorney.



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Indian Corn Wreath



This easy yet season door wreath will be a great focal point for your home and you are sure to get lots of compliments on your unique and beautiful handiwork.

Find full details here: <http://www.stonegableblog.com/indian-corn-wreath-diy/>

Grilled Tomato Skewers on Toast



INGREDIENTS

- 1 pound cherry tomatoes
- 3 Tablespoons olive oil or grape seed oil
- 1 teaspoon Worcestershire sauce
- 2 cloves garlic, finely minced
- salt, to taste
- pepper, to taste
- about 10-12, 8" bamboo skewers
- Sliced crusty bread
- 1 cup ricotta cheese, softened goat cheese or your favorite cheese. Or even pesto is great!

DIRECTIONS

- ◆ Soak and fully immerse bamboo skewers in water for about 30 minutes
- ◆ Wash and dry cherry tomatoes. Remove the stems if you want. Keeping them on just makes them prettier, then you can pull them off before serving.
- ◆ In large bowl, combine oil, Worcestershire and garlic. Add cherry tomatoes to marinade bowl and toss to combine and coat tomatoes.
- ◆ Skewer about 4-5 tomatoes on each bamboo skewer. Sprinkle salt and pepper to taste on each tomato skewer.
- ◆ Heat Grill to medium/high heat.
- ◆ Reserve the leftover marinade and brush them on the sliced crusty bread. If you need more marinade, just add a little more oil to the bowl.
- ◆ Grill tomato skewers on each side for about 3-4 minutes, or until they are cooked. Cooking time will vary depending on the heat of your grill and size of your cherry tomatoes.
- ◆ After tomatoes are cooked, grill both sides of the bread until crispy.
- ◆ Spread cheese on slices of bread and top with tomatoes. Remove stems if you want before serving.

http://whiteonricecouple.com/recipes/grilled-cherry-tomato-skewers/?crlt_pid=camp.1019vfzFHvcp

IS YOUR REAL ESTATE TITLED IN THE TRUST?

We cannot emphasize enough the importance of funding your trust with your real estate. Funding your trust with real estate involves re-titling your real estate so that you are no longer the individual owner of your property, but rather, the owner of the property is your trust. When your trust is first established, we make sure to transfer your property into the trust by preparing a Quit Claim Deed that conveys your interest to your family trust. However, if you own property outside of California, you would be responsible for re-titling that property into your trust, as our office can not handle out of state transfers.

Why is this so important? Because for so many of you, the main reason the trust was established to begin with was to avoid the court probate process upon your death and to ensure a smooth transition of assets to your loved ones after you die. When you die owning real estate in your individual name, instead of in the trust name, the probate process is required to transfer the property to your loved ones – which is what we try to avoid when we establish a trust.



Therefore, you must always ensure that any real estate you own is in the name of your trust. While our office might have transferred the property into your trust when the trust was established, if you subsequently refinanced your property or took out a line of credit, there is a chance that the property was taken out of the trust name during that financing process. If you are not sure about the title to your property, you may call our office for assistance in determining this.



August 16th Free 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

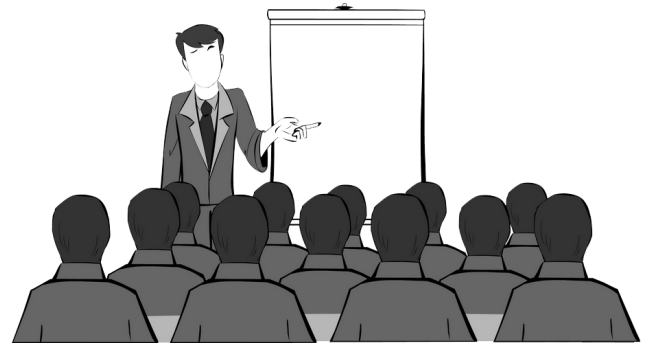
a very relaxed environment. Please **encourage your loved ones to attend** the seminar so that they may learn more about the estate planning process and benefits. We will have another **seminar August 16th!** Please share with family and friends to help others know they are prepared financially for the future!

OCTOBER FAMILY DAYS:

We have 5 sessions available to attend.

- ◆ Saturday, October 6, 2018 9:30am-11:30am & 1pm-3pm
- ◆ Thursday, October 11, 2018 6:00pm – 8:00pm
- ◆ Saturday, October 13, 2018 9:30-11:30 & 1-3

****You only need to attend ONE of the sessions.** In order to attend you **must** bring a family member, successor trustee, or friend whom is NOT a client of ours.



We hope that you have had the very best experience with our firm! And we hope that you would consider referring a friend that we may be able to help the same way we helped you! Getting a referral from a customer gives us a lot of pride! It shows us that we did a good job and our clients appreciate us!

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