



July 2017

Annual Family Days Event!

Every year, our office hosts an annual “Family Days” where we invite our clients to bring their loved ones: children, friends, neighbors, successor Trustees – to learn more about the trust administration process. For so many of us, the steps to take after the death of a loved one are a mystery, and we want to demystify that process for you.

Family Days is a casual event – it’s hosted onsite at our “Classroom”, and holds roughly 50 attendees. We hold five different sessions and each one fills up quickly, so please remember to RSVP once the invite arrives. The dates have not yet been set, but we anticipate holding Family Days around October. You will receive a save the date in the mail with the exact date and more details.

We look forward to seeing you at the next Family Day where we discuss trust administration, transferring assets to beneficiaries, long term care planning and dealing with a parent or loved one’s incapacity. Light refreshments and snacks are served and we encourage everyone to attend, as it is filled with lots of useful information and great speakers.



In this issue

Annual Family Day.....	1
The Passing of a Spouse	2
CRAFT	3
Recipe	3
Refer a Friend.....	3
Monthly Seminar.....	4
4th of July Wishes	4

The Passing of a Spouse

The passing of a spouse is life changing, in so many ways. No one can prepare you for the loss of your lifetime companion. And the events that immediately follow a loved one's passing can be overwhelming for a surviving spouse. Dealing with final arrangements, paperwork, taxes, death certificates, bank accounts and a host of other matters can often leave the surviving spouse feeling lost and confused. And that's normal. At the Law Office of James F. Roberts & Associates, we encourage spouses to contact us soon after their loss so that we may guide them in the right direction.



Depending on the provisions of your trust, certain items may have to be completed with regards to your estate plan in a timely fashion. There are certain legal and practical steps that must be taken after every spouse's passing, and our office will absolutely be a resource to you. While you don't need to contact us immediately, we do encourage a phone call or appointment with our office within one month of the death of a loved one so that you have the information you need to properly wind down your spouse's affairs.

Things such as bank accounts, credit cards, retirement accounts and life insurance need to be handled properly and the deceased spouse's name should be removed from most banking and investment accounts. The title to real property, if owned jointly with your spouse, should also be cleared. Certain tax decisions must be made following a spouse that can result in a tremendous financial loss to your estate if not made within a timely fashion. If your spouse is named as your medical power of attorney, or your financial power of attorney, your estate planning documents should be reviewed to ensure that you have the property individuals designated to make decisions for you in light of your changed circumstances. In some cases, legal notices must be sent to the children and heirs of the deceased spouse notifying them that the individual has passed away and that the person has a trust.



There is no one-size-fits-all advice that we can give to you, but we can tell you that we will be there for you, we will support you, and we will guide you through this very difficult time in your life. Please remember to contact us at the death of the first spouse so that we can be a resource to you.

Summer Flip Flop Wreath

To Create a fun and unique door décor purchase some fun colored flip flops and some flowers to complement the colors.

Use a nice ribbon that matches and a hot glue gun to attach them.

This is a great project for a family!

Make it more personalized with some paint pens!



Summer Snack Recipe

Ingredients:

- ♦ Strawberries
- ♦ Cream cheese
- ♦ Blueberries

Simply slice a segment out of the strawberries and fill with whipped cream cheese and place two or three blueberries down the center. Chill and serve as a nice refreshing summer snack!



Cheesecake Stuffed Strawberries



How Are We Doing?

At the Law Offices of James F. Roberts & Associates we work to be the best estate planning attorneys!

We hope that have reached that goal with each and every client but we would love to hear from our clients!

We invite you to tell us what you think! Share your experience online with Google! [Just Click this link!](#)

And if you think we have done a great job, refer a friend!!

We promise to give them the same wonderful service that



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!

WE HOPE YOU AND YOUR FAMILY HAD A WONDERFUL
4TH OF JULY!



The Law Offices of James F. Roberts & Associates

3061 E. La Palma Ave.
Anaheim, CA 92806

Phone: 714-459-5481
Toll Free: 866-590-0886
E-mail:
amanda@webuildyourtrust.com



LAW OFFICE OF JAMES F. ROBERTS
& ASSOCIATES, APC
ESTATE PLANNING YOU CAN TRUST