



## MAJOR LAW CHANGE IN CALIFORNIA

February 2019



Effective January 1, 2019 the California State Legislators and the California Governor changed all trusts in California. The effect of SB 909 (as codified commencing in Probate Code 15901) permits a fiduciary of an irrevocable trust (i.e. a successor Trustee) to distribute property out of a first trust to one or more second trusts (which may be created under any jurisdiction) or modify the terms of the first trust without the consent of the

beneficiaries or approval of court, provided that the fiduciary has "limited distributive discretion" over the principal of the first trust for the benefit of one or more qualified beneficiaries. "Limited distributive discretion" is defined as discretionary power of distribution limited to an ascertainable standard or reasonably definite standard.

The second trust must grant each beneficiary of the first trust rights which are "substantially similar (i.e. no material change in a beneficiary's beneficial interest)" to their beneficial interests in the first trust. "Substantially similar" is defined as a distribution applied for the benefit of the beneficiary, on the beneficiary's behalf if the beneficiary is under a legal disability, or the distribution is made pursuant to the terms of the first trust instrument.

This new law applies to all existing and future trust governed by the law of California. If you don't want your successor Trustee to be able to modify your trust after your death you must now opt out of this new legislation.



### IN THIS ISSUE

Major Law Change .....	1
Rustic Love Sign.....	2
Heart Salad.....	2
Review Your Estate Plan.....	3
Next Seminar .....	4
Refer a Friend.....	4
Holiday wishes .....	4



# RUSTIC REPURPOSED LOVE SIGN

Repurposing some common items you may have around the house into a fun and funky DIY wooden LOVE sign for Valentine's Day. Would be a great craft for rustic wedding decor also.

and some tarnished silverware.

Repurposing some common items you may have around the house into a fun and funky DIY wooden LOVE sign for Valentine's Day. Would be a great craft for rustic wedding decor also.

Use your glue gun to stick them on the back of an old sign or piece of wood from Home Depot. Then you have LOVE!

It doesn't get easier than that!

What? Wrong holiday? Repurposing some common items you may have around the house into a fun and funky DIY wooden LOVE sign for Valentine's Day. Would be a great craft for rustic wedding decor also.



<https://www.houseofhawthornes.com/rustic-wooden-repurposed-wedding-decor/>

## Healthy Heart Day Salad

<http://joandsue.blogspot.com/2014/02/valentines-show-love-salad.html>



### INGREDIENTS

- 1 pkg Earthbound Farms Spring Mix
- 1 large cucumber, sliced
- 2 red peppers, seeded (tops and bottoms removed)
- 1 bunch radishes, sliced
- 1 small brick of partly skim mozzarella cheese
- 10 - 15 small plum tomatoes, halved
- 1/4 to 1/2 pkg Grab & Go Simply Sesame Trail Mix
- 1 bottle Kraft Roasted Red Pepper with Parmesan salad dressing

### DIRECTIONS

- ◆ Place the Spring Mix in a large bowl. (If you can't find the Earthbound Farms Spring Mix just use a similar mixed greens blend, about 6 cups or more.)
- ◆ Using a small, heart shaped cookie cutter (about 1 inch) cut out heart shapes from the cucumber, red peppers, and mozzarella cheese.
- ◆ Sprinkle the veggies and cheese over the salad.
- ◆ Sprinkle with a generous amount of the Simply Sesame Trail Mix. (If you can't find this you can leave it off or substitute with another crunchy salad topper.)
- ◆ Just before serving, drizzle with your desired amount of Roasted Red Pepper Dressing and toss until equally distributed.

## ***WHEN TO REVIEW YOUR ESTATE PLAN:***



Some of the things we encourage you to think about prior to scheduling a review of your estate plan are noted below:

- ◆ Are your beneficiaries old enough to inherit your assets or do you still have age restrictions in place for their inheritance?
- ◆ Who is the best person to administer your estate and distribute your assets after your passing?
- ◆ Who is the best person to make medical decisions for you?
- ◆ Is the Trustee you selected also the right person to make financial decisions for you during a period of incapacity?
- ◆ Have you acquired or sold real estate since your trust was last created or amended?
- ◆ Has there been a death or illness among your loved ones that may necessitate removing or changing the order of Trustees and Agents named in your estate plan?
- ◆ Have you divorced or remarried, or lost a spouse?

If you have questions about any of these items, or if you believe one or more changes have occurred in your circumstances that would warrant an update to your estate plan, please contact our office to schedule a review of your trust.





## Free Seminar



We regularly conduct a free estate planning 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. Our next event will be **February 21, 2019**. We look forward to seeing you and your family, friends, colleagues and neighbors! Please share this event!

Happy  
Valentine's  
Day



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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