



How Does the Coronavirus Crisis Affect My Estate Plan?

June 2020

Due to the Coronavirus pandemic, in just a short period of time, we have experienced unprecedented changes. With those changes have come a myriad of concerns – concerns for our health, our jobs, our retirement accounts, our peace, our economy and the health of our nation. Unfortunately, no one is immune from the effects of this crisis – but we hope to offer you some solace during this time by being a resource to you. Many of you have expressed concerns about your estate plans during this time -- rushing to make changes to your living trust that you have been putting off; reviewing your healthcare directives to make sure the provisions reflect your wishes; and encouraging your loved ones to establish their own estate plans and powers of attorney. We appreciate you entrusting us to take care of these matters for you, and we are committed to taking care of your estate planning needs in the safest, and most efficient, manner possible.

Since Governor Gavin Newsom ordered all non-essential businesses in California to close their doors, we have complied. However, we have successfully re-invented our business so that we can help clients from behind closed doors. Here are just a few of the action steps that we have taken to protect you:

1. We have stopped meeting with our clients in person. We are meeting with our clients in a variety of ways including phone calls and video conferencing.
2. Amendments to Trusts and Wills can be executed without you leaving your home or anyone coming to your home.
3. Certain documents do require that the signer's signature must be notarized—for example deeds, affidavits of death of a Trustor, etc. Some of our clients have their own acquaintances notarize their documents. UPS stores and Mailbox Etc. stores are considered essential business and some of our clients have notarize documents at these facilities. Banks also have notaries. We have arranged for travelling notaries, who utilize gloves, masks, and take safety measures to minimize the risk for our clients.
4. We have extended our hours until 9 p.m. and are now accommodating Saturday appointments as well (by phone or video conferencing).

These are just a few of the steps that we have already taken. We will soon have a free video available on our website that will explain the benefits of an estate plan in case you know of anyone that wants the peace of mind that comes from avoiding probate and knowing your affairs are in order. We are here to help you during these troubled times. As always, thank you for being part of our estate planning family.



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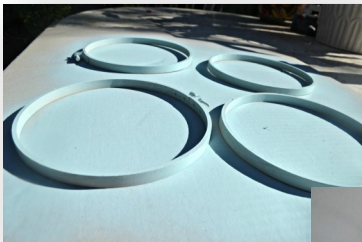


Farmhouse Style Decorative OrbsDIY

For Ideas on how to create lots of new fence post signs visit some of these sites:
<https://hip2save.com/diy/diy-farmhouse-style-orbs-embroidery-hoops/>

Here is what you need:

- 2 sets of 6-inch wood embroidery hoops (4 pieces in total)
- thumb tacks
- desired spray paint, craft paint, or wood stain



1. Separate two sets of [embroidery hoops](#) and either paint, stain, or leave them as is if desired. You will have four separate pieces.
2. After they are completely dry, grab the two hoops with the metal locking mechanisms, and intersect those two. Just place one inside the other.
3. Slide the other two hoops, one at a time, inside and move them around evenly so they form a sphere. Make sure they are going in the opposite direction as the first two hoops.
4. Manipulate the orb until you get the hoops evenly spaced and arranged how you'd like it.
5. Optional Step: Attach thumb tacks to each intersecting point. I like the look of the tacks, and I think it helps keep them in place, but this is up to you! You can also leave orb as is instead.

Tip: It helps to use a set of pliers to push in stubborn pins that may not go in easily.



HEALTHCARE DIRECTIVES ARE MORE IMPORTANT THAN EVER

During a pandemic, we are reminded constantly of just how important an Advance Healthcare Directive is. As even the young and seemingly healthy fall ill, it is more important now than ever to have a medical directive in place. An Advance Healthcare Directive is one of the simplest ways to ensure that your medical wishes will be followed, and that the people you trust will be involved in your healthcare decisions when you are unable to make those decisions for yourself. In an Advance Healthcare Directive, we include provisions regarding preferences for end-of-life treatment, such as life-support, pain and comfort treatment, and whether or not to be resuscitated. Another important healthcare document is the HIPAA authorization, which authorizes the release of your medical records and health history to your designated agents – without this document, it is against the law for hospitals and doctors to disclose this information to anyone.

While there might be many things outside of our control right now, having an Advance Healthcare Directive and HIPAA authorization is one thing that you can easily control. If you already have one, review it to make sure it reflects your wishes. Consider providing a copy to your children, or the doctor's office, and recommend your loved one's place a copy in their glove compartment for quick access. If you know someone who has been putting this off, please encourage them to create one – we can help them. If you or someone you know need to have your medical directive created, or reviewed, please call us at (714) 282-7488

Bacon Wrapped Grilled Peaches

Ingredients

- 8 Strips Smoked Maple Bacon
- 2 ripe peaches (white, yellow, or 1 of each)
- Balsamic glaze
- Fresh basil, chopped



For full instructions:

<https://thebaconer.com/blogs/recipes-with-bacon/bacon-wrapped-peaches/>

DIRECTIONS

1. Heat grill to med
2. Cut each peach into 8 wedges
3. Cut each bacon strip in half
4. Wrap each wedge with a half strip of bacon, secure with a toothpick
5. Place wrapped peaches on the grill, cooking first side until bacon is crisped to your liking and the peach flesh has browned and started to caramelize
6. Flip wedges and cook other side
7. Remove from grill and let rest 2-3 minutes
8. Arrange on serving platter, drizzle with balsamic glaze and garnish with a sprinkling of chopped fresh basil



Free Estate Planning Seminars



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" and led by our very own James F. Roberts. 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 look forward to seeing you and your family, friends, colleagues and neighbors! Please share this event!

Please contact our office at 714-282-7488 for information about the next seminar!



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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