

What Do New Year's Resolutions Have To Do With A Law Firm?



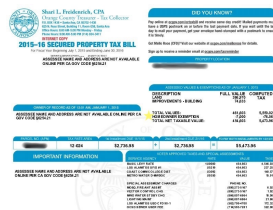
It's pretty safe to say that most people make resolutions for the new year. You may not write them down in a special, secret binder, or proudly slur your intentions at the annual new year's party; but there's a good chance you are trying to make improvements in some form.

So just what do new year's resolutions have to do with a law firm?

No, we didn't change our practice to a weight loss clinic (the #1 resolution year after year).

Instead, we took a look at a few top ten resolution lists and found five that consistently pop up. Then we matched those five resolutions with estate planning or inheritance dispute topics, of which our attorneys have firsthand experience and have written about in our monthly newsletters.

Here are five of the top 10 new year's resolutions and how, if the situation applies to you, a family member, or a friend, Law & Stein can help you achieve your new year's resolutions this year.



#1 - Improve Your Finances

Did You Complete "Homeowner's Exemption" on Your Property Tax Bill for Prop 19?

There are some PROS and CONS to the recently passed Proposition 19 in California. Unfortunately, one of the cons is the property tax reassessment exclusion for transfers of property between parents and children, however there are some options to consider that may help assist in potential tax efficiencies. Check out Partner, estate planning attorney, and tax planning attorney, Zeb Law's letter to clients laying out the options. Deadline to file is February 11th!

Check out our December newsletter on this topic to find out more:

Did You Complete "Homeowner's Exemption" on Your Property Tax Bill for Prop 19?

#2 - Improve A Relationship

How Elder Abuse Can Lead to Litigation



Each year, millions of elderly Americans fall victim to some type of elder financial abuse, resulting in irreversible financial loss and significant psychological distress. Inheritance dispute attorney, Christina Yee, wrote about how to detect elder financial abuse and possible undue influence over someone and how California law protects the elderly.

Check out our November newsletter on this topic to learn more:

[How Elder Abuse Can Lead to Litigation](#)

WHAT YOU DO TODAY CAN IMPROVE ALL YOUR TOMORROWS

#3 - Stop Procrastinating

Are You A Trustee? Take It Seriously!

First question – Have you completed your estate plan? If not, stop procrastinating and in the words of Nike, just do it.

If you are the trustee of an estate plan, Nate Loftin, estate planning attorney, says the time is now to properly administer the trust, communicate with the beneficiaries and obtain appraisals of the trust assets.

Check out our September newsletter on this topic to learn more:

[Are You A Trustee? Take It Seriously!](#)



#4 - Manage Stress Better & #5 - Set Aside Time for Yourself

When to Contest A Trust

Chad Brandel, inheritance dispute attorney and business litigation attorney, has extensive experience representing clients involved in inheritance disputes with a trust, will or probate; breaches of fiduciary obligations; allegations of trustee wrongdoing; and claims of elder abuse. If you are stressing over potentially contesting a will or trust, check out these five things to consider and then let us take the burden off of you and fight for what was rightfully intended.

Check out our February newsletter on this topic to learn more:

[When to Contest A Trust](#)



We look forward to serving you & wish you the best

We continue to work for new and existing clients during COVID-19 (coronavirus) while placing safety and health as a priority. We are happy to accommodate your needs, including Facetime, SKYPE and ZOOM for virtual, face-to-face connections. Contact us directly to speak with someone who can help answer your questions.

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Or send us a private email at the link below and we will respond promptly:

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www.LawandSteinllp.com

The Law & Stein Newsletter is a monthly publication to share useful information with our clients in matters of estate planning, tax planning, inheritance dispute litigation, elder abuse, probate

and business litigation, and premises and product liability defense.

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