

New Year! New Attorneys! Same First-Rate Counsel!

by Shawn C. Winkler



As we enter a new year, we extend our appreciation and gratitude to both our existing and new clients. We have a genuine passion for what we do and we thank you for trusting Law & Stein as your legal counsel.

2021 Recap

2021 was another unique year where we found ourselves overcoming challenges similar to those that effected everyone. At the same time, we were and continue to be, incredibly grateful to be in a profession where we provide a service that helps others gain peace of mind, remove an unwanted burden, remedy the financial abuse of a loved one, or stop the mismanagement of an inheritance.

Over this past year we settled cases where clients received thousands or millions in rightful inheritances; stopped financial elder abuse; settled real estate and partnership disputes; took over the burden of trust administration; managed the probate process; and set up numerous solid and tax savvy estate plans.

We also hired three new attorneys and two new paralegals with the goal not to become bigger, but become even better in providing strategic and cost effective counsel for our clients while working collaboratively with their advisors when needed.

If you are new to Law & Stein or have limited experience with our services, we want to share the breadth of our legal services in case you, or a family member or friend, may need these services in the future.

So, without further delay, take a look and please do not hesitate to give us a call if you have a matter you would like to discuss.

LITIGATION MATTERS

- Inheritance Disputes with Family Trusts and Wills
- Claims of Elder Financial Abuse
- Business Disputes with Corporate Entities and Partnerships
- Probate Litigation
- Premises and Product Liability Litigation

ESTATE PLANNING NEEDS

- Estate Planning
- Tax Planning
- Business Planning

- Trust Administration
- Probate Administration



LITIGATION MATTERS

At Law & Stein, our trusted litigation attorneys devote thoughtful and meticulous attention to the needs of each client and become your tenacious advocates who fight for your rights. Our clients include:

- Families involved in Inheritance Disputes
- Large Corporations
- Prominent, High Wealth Individuals
- Family-owned Businesses
- World-wide Nonprofit Organizations
- Corporate Executives

Regardless of the size of the matter, we take pride in providing the same level of commitment, diligence and ingenuity to every client.

Inheritance Disputes - When family inheritance disputes arise, our will, trust and estate litigation attorneys are there for your protection. Inheritance disputes arise when a loved has passed and there is a dispute involving a:

- Trust
- Will
- Conservatorship
- Guardianship

Our team understands the emotional exhaustion that comes with being involved in an inheritance dispute with family. We listen to your side of the story to understand your goals. We then break down the litigation process for you, explaining in clear terms what to expect, possibilities for resolution before trial, and the risks and rewards of proceeding to trial.

In the event a matter cannot be resolved informally (out of court), we vigorously represent our clients at court trial and beyond.

Elder Financial Abuse - We understand it often becomes necessary to appoint a guardian, agent or fiduciary to help manage your various assets and finances. Unfortunately, these assets can become advertently or inadvertently mismanaged and our litigation attorneys have experience to ensure your assets and finances are protected and your interests are preserved. Claims of elder financial abuse can include:

- Unauthorized appropriation, sale, or transfer of an elder's property by the agent or guardian
- Wasting, embezzling, or intentionally mismanaging the elder's assets
- Misappropriating, misusing, or transferring without authorization money from an elder's account
- Failing to properly use an elder's assets for their support and maintenance



Business Disputes - Our experience covers small businesses and large corporations who are often faced with complex disputes involving:

- Partner dispute
- Other businesses
- Government entity
- Customer dispute
- Company's shareholders dispute

Law & Stein is a strong believer in alternative dispute resolution and practice it wherever appropriate in order to save all parties the costs of protracted litigation. However, in the event that a matter cannot be resolved informally, we have successfully litigated numerous court trials with rewarding results.

Probate Litigation - When issues arise due to the contest of a will, our attorneys are well versed in the complexities of probate litigation and have vast amounts of experience in the field. We understand how stressful it can be and are prepared to handle the complications to get our clients through the probate process with the utmost efficacy in both time and cost.

Premises and Product Liability

Litigation - Our litigation attorneys have aggressively defended against premises liability claims brought against owners, operators and managers of companies and commercial properties, protecting businesses and their financial interests.

ESTATE PLANNING NEEDS

With over 90 years collective experience, our trust administration and estate planning attorneys empower our clients with the legal resources and choices they need to make the most informed and strategic decisions.

Whether you are looking for a will, power of attorney, or health care proxy, or require more sophisticated planning involving the use of living trusts, we are here to advise, plan, and help you realize your personal and financial goals.

Estate Plan - Tasks involved in estate planning include:

- Creating a Will or Living Trust
- Naming an Executor of the Estate
- Establishing Guardians for Dependents, if necessary
- Setting up Durable Power of Attorney for Financial and Medical decisions
- Creating a Healthcare Directive
- Naming of Beneficiaries on Insurance Policies



Tax Planning for Your Business and Estate

- Our tax planning attorneys constantly evaluate your estate plan and apply cutting-edge strategies to potentially save you money and minimize adverse tax consequences for wealth preservation and protection. Our goal is to develop an approach which best serves your needs in a cost-effective manner, including minimizing state and federal tax burdens to assure that assets pass to the intended beneficiaries.

Some common ways to minimize tax liability include:

- Tax-efficient Mutual Funds
- Irrevocable Trusts
- Charitable Funds
- Municipal Bonds
- Traditional/Roth IRA's

At Law & Stein we work closely with our clients and their financial advisors in order to provide judicious tax planning with the most cost-efficient solutions. Tax laws can be complicated and are estate tax attorneys are experienced in taking the following into consideration when devising a tax plan:

- Short and Long-term Financial Goals
- Choice of Investments for Retirement Plans
- Cost Benefit of Your Tax Planning Options
- Filing Status (Deductions & Exemptions)
- Maintaining Tax Compliance



Probate - Probate is the court proceeding that proves the validity of a will and through which an estate is administered. All of our attorneys have expertise in both state and federal laws and can provide our clients with legal advice and services throughout every step of probate including:

- Filing Petition with Court
- Appointing Executor or Administrator if no Will
- Written Notice to Creditors
- Inventory of Estate
- All of the estate and funeral expenses, debts and taxes are paid from the estate
- Legal Title Property Transfers

Trust Administration - Trust administration usually begins upon the death of the settlor and can be a complicated process. The role takes its toll emotionally and can have adverse legal ramifications if not administered in a timely and strategic manner. We have the legal experience

to understand all of the ramifications, and the empathy to help you make the best choices. Because we are also well versed in tax and estate planning, we can explain how each portion of the trust operates, and what your options are.

Click here to download you FREE guide to Trust Administration:

[FREE Trust Administration Guide](#)



We look forward to serving you & wish you the best

We are here to provide you with legal guidance you can trust while placing safety and health as a priority. We are happy to meet in person or to accommodate other 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.

T (949) 501-4800

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

info@lawandsteinllp.com

Visit our website for more information and to review our partner and attorney bios:

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.

LAW & STEIN LLP
2601 Main Street, Suite 1200
Irvine, CA 92614
info@lawandsteinllp.com

