

ORANGE COUNTY

JOURNAL

Attorney

Volume 143, 2018
\$6.95

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Attorney of the Month

Shadi Shaffer,

To Educate, Motivate and Protect

Asset Protection & Elder
Law Center, Irvine



TO EDUCATE, MOTIVATE AND PROTECT

“We got into estate planning before it was the hot area of legal practice because we have a love for family and proactively protecting clients from legal troubles.”

“Being there for my clients and their families when they need me most—that is solid estate planning! I’m very passionate about educating my clients so that when they leave my office and I’m not in front of them, they can maintain their lives in such a way as to avoid probate and keep to the intention of the trust plan we put into effect in the beginning. What we need more in estate planning is a holistic approach - a long term relationship and not just a transactional one,” says Shadi Ala’i Shaffer. She and her partner, Patrick P. Phancao, are partners in the Asset Protection & Elder Law Center.

For more than 15 years the Orange County-based firm has represented individual persons, families, businesses, corporations and professional partnerships. Shaffer and Phancao represent clients locally, nationally, and internationally, including Europe and Asia. Their practice includes Estate Planning, Probate and Trust Administration, Domestic and Offshore Asset Protection, and Medi-Cal planning. The firm’s talent base includes Associate Attorney Ruth Brissenden and Client Liaison and Paralegal Carol Ivancik.

There is a lack of understanding by individuals and even professionals on the importance of estate planning, which is why the firm is focused on education. The typical client is generally someone 55–80 years old who knows the importance of a comprehensive estate plan. Many, however, do not have the knowledge to evaluate properly the many options available or the benefits and dangers within those options. One of the services the firm provides is lifetime guidance at no additional cost and a series of systems to monitor the progress of their

clients’ plan. “We’re all about systems. It doesn’t matter if you’re a \$100 million client or if your estate is simply \$100,000, you’re going to get the exact same service. The planning may be different, but we provide the same process and commitment to each and every client,” Shaffer says.

The firm features no-cost consultations and are proud of their easy to understand approach to estate planning that their clients often rave about via on-line reviews and their YouTube videos.

Cases are handled on a flat-fee basis so that each client knows the costs associated with the case before committing to a relationship. The term “relationship” is an essential building block of the firm’s business plan. Shaffer says, “Our clients can reach us via phone or email within 24 hours when they are in need of our guidance or help. The compliment I get the most is how I communicate to them in a way that helps them easily understand the estate planning process and my passion in educating them on all aspects of their trust plan. They love that we guide them through it all A-Z, from the drafting of the plan to ensuring their assets and real property are all funded under their trust or properly beneficiary designated. They also love that we handle probate and trust administration so we can assist their loved ones/beneficiaries in distributing the assets at the time of their passing.”

“We got into estate planning before it was the hot area of legal practice because we have a love for family and proactively protecting clients from legal troubles.” Shaffer remembers the days when she was the only young female attorney in the



MAKING A BETTER

probate court room and her colleagues asking why she would go into such a dry area of law. “I love estate planning—it is about protecting people, families, and their hard earned assets or ensuring the family business, or more importantly, a family’s legacy gets passed properly to the next generation.”

The firm’s commitment can extend to people who are not yet clients. Shaffer once stopped an acquaintance (who was in his 50’s) to tell him she was concerned that he had not put his estate/trust plan in place. He had met with the firm about estate planning earlier, but had not yet hired them. She encouraged him to get his assets and estate affairs in order soon—whether or not he hired Asset Protection & Elder Law Center. A few weeks later he hired her firm. Approximately a year later their client passed away unexpectedly. Without the estate planning in place, his sizeable estate and successful businesses and operations would have left his family with significant legal issues, probate expenses, and a financial and personal mess.

Clients agree with the process. One wrote, “Great Estate Planning Attorney! Shadi is professional, knowledgeable and extremely pleasant to work with! I was very pleased to work with such a knowledgeable and professional lawyer in the area of estate planning. Shadi was extremely informative and held our hand through the entire process. My husband and I had been dragging our feet for over a year to get our estate plan going (even though we knew we had to do it) just because it seemed so daunting... but Shadi not only made it easy for us but she made sure we understood everything we were signing and helped us get to the finish line. She was very easy to work with! I am recommending her to ALL my friends who do not yet have an estate plan in place. Thanks Shadi for making this happen for us. I sleep better at night knowing we have this in place and that you’ve done such a thorough job on it. We appreciate everything from the bottom of our hearts!” Pooja M.

A Family’s Experiences Help to Find a Niche in Asset Protection

Shaffer is from an immigrant family. Her mother and father moved to the U.S. when they were a young married couple with a one-year-old son and only \$2000 in their pocket. They didn’t speak English, but became one of America’s rags-to-success stories in New York where Shaffer was born. “I was an advocate early on for my family. My parents just didn’t know the law because they weren’t educated in it. I found that estate planning would be a place where I could be more proactive,” she says.

Shaffer has lived in California since elementary school. She attended Dana Hills High School and then Saddleback College. She earned her Bachelor of Arts in Law & Society at the University of California, Santa Barbara. The following year, she completed her Masters Certificate while studying abroad in Spain. She earned her Doctorate degree at California Western

School of Law in San Diego, California in 2001 and was admitted to the State Bar of California in 2002.

Following graduation she worked for a medium-size firm. There she developed what she calls her “love-hate relationship” with the business of law because she learned that some firms put the organization and its interests before the clients’ interests. “I wanted to help people avoid unnecessary legal costs and litigation. I wanted to be proactive, taking an offensive and not defensive approach in the legal work I provided. I didn’t want clients to come to us when they were being sued or when something went wrong; I wanted to prevent it from happening from the start. I also wanted to focus in an area of law that was non-adversarial and the nature of the practice was problem solving. Earning legal fees for being proactive and protecting clients feels much better. I went into business with my best friend of 23 years because of our likeminded values and focus on family. Patrick and I make an amazing team and our clients love that we are a family-based firm,” Shaffer says.

Shaffer had an early interest in environmental issues and says she wanted to be an Erin Brockovich protecting people from big companies and their environmental harms. But her legal experience, growing up in an immigrant family and her personal goals and instincts led to what she had always done—protect parents and families who were taken advantage of often for their lack of understanding and knowledge.

Her interest in estate planning was sparked early on by an attorney with whom she shared office space. She met his clients and experienced the processes and procedures involved in serving their needs. She discovered that she enjoyed working with and getting to know his clients and their families. Shaffer says, “Protecting someone’s hard earned assets and making sure that things were in order upon incapacity and death was something that came naturally to me. I absolutely love what I do and often my clients say it shows in my interactions with them and with the way we customize our comprehensive plans for them.”

“The Secret to This Job ... Personal Relationships.” – Jerry Maguire Movie

Shaffer and Phancao decided to operate as a boutique law firm. “We are not going to be a medium or large firm by choice. We like the boutique feel (and so do our clients) because we want our clients to have that close, personal relationship with us,” she says.

Shaffer and Phancao have worked to create a turnkey approach to their comprehensive estate plans so they can efficiently assist not only the individual and families but the busy working professionals that often know the importance of estate planning, but can’t find the time to effectively put



one in place. They work with physicians and attorneys as well to properly protect their kids, homes, and successful businesses. They have clients as far as San Francisco who they have been able to protect through their turnkey estate planning system, many of whom have also received advanced estate and asset protection planning beyond a revocable trust plan.

"I once went to my client's medical practice just to have him sign and notarize his estate plan, as he had been postponing the trust signing for several weeks. To his wife's relief, we were proactive and scheduled an appointment with his staff to have him meet with us at his medical office to sign his trust documents protecting his minor children, the family home, and the medical practice he had been tirelessly building for the past 27 years."

Their hands-on approach works as demonstrated by a letter from a satisfied client who wrote, "Dear Shadi, It has been a pleasure working with you to prepare estate plans for my partner and me. We are impressed with your knowledge, honesty and willingness to handle our unique circumstances. We appreciate your fun yet professional atmosphere and look forward to working with you for years to come. Your passion for what you do is evident in all aspects of your personality and business and we look forward to making referrals to you. With gratitude," Vicky W.

Shaffer says, "I love knowing that the things my clients have worked hard for all their lives are protected. That when the time comes, families can mourn the death of their loved one knowing things are in order. Or if the family needs to deal with a severe illness, accident or incapacitation, they can come together and focus on what is really important and don't have to worry about things falling apart. I tell my clients the last thing I want you and your family to worry about is hiring me or another attorney for that matter."

Shaffer tells her clients and potential clients that although "life happens," the point of sound estate planning is to prepare for the inevitable, so they will have the ability to make decisions relating to their loved ones based on what they want, not based on what an attorney, family member, or court system thinks they want. "Family is the cornerstone of our lives and we want to bring the same to our clients. We love what we do and building lifelong relationships with our clients is our goal and the core of our business plan. Keeping families protected and united is what we are about," Shaffer says. ■

Contact

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EXPERIENCE



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» EDUCATION

- Bachelor Degree, University of California, Santa Barbara
- Masters Certificate in Onati, Spain
- Doctorate Degree in San Diego, California
- Admitted to the State Bar of California in 2002

» AWARDS & EXPERIENCE

- AVVO Critics Choice Award 2017
- Yelp Preferred Five Star Rated Firm 2017
- Trust Talk Radio Show 2014–2015
- Fidelity Investments Estate Planning Specialist Southern California Region, 2015–2016
- Wealthcounsel Estate Planning Attorney Member 2005–Current
- BBB Accredited A+ Business, 2016–2017

» COMMUNITY SERVICE

- Behind the Scenes Volunteer of the Year 2016, Stand Up for Kids Orange County
- For the Unseen, 501(c)(3), Board Member, 2013–Current
- Stand Up for Kids Orange County, 501(c)(3), Board Member, 2009–Current
- Veterans Legal Institute Volunteer
- Served as a Big Sister with Big Brothers Big Sisters of Orange County
- Former Board Member of the Pacific Youth Symphony