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“At our Firm,
Your Estate Plan
is Not Business,
it’s Personal...”



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“Rest isn’t a reward for
work; it’s part of the work.”

@leesareneehal

THE ROLE OF REST IN HIGH PERFORMANCE

In a culture obsessed with productivity, rest often feels like a luxury at best, a weakness at worst. Yet, research... and lived experiences confirm what our grandparents knew intuitively: without real rest, there is no sustainable performance. High achievers in every field — from Olympic athletes to CEOs — schedule recovery with the same discipline that they schedule training and meetings. The body, the mind, and even relationships require deliberate pauses in order to flourish.



Consider the world of athletics. Elite runners and swimmers know that muscles only grow stronger after periods of recovery. Push too hard without pause, and the body breaks down in injury. Though we entrepreneurs do not see ourselves as ‘high performers’ per se, the reality is for us to perform at our best, we must respect our own limitations. The workplace is no different. Employees who never unplug inevitably see their creativity flatten, their patience wear thin, and their decision-making suffer. The latter can have immeasurable impact on your business. Not in terms of simply numbers, but the loss of time it can generate, keep that in mind! In contrast, those who prioritize rest return with sharper focus and greater resilience. Studies have shown that workers who take their allotted vacation days often outperform those who try to “grind” year-round. Rest is not the absence of work — it is the foundation in which quality work can evolve. Not to sound too... metaphysical or anything, but meaningful work does bring true fulfillment in life. We truly believe that at our firm. Anyhow, moving on...

Rest also expands beyond sleep and vacations. It includes daily rhythms of disengagement: a walk without a phone, a meal shared without multitasking, a hobby enjoyed for no measurable output. Something Neuroscience has shown that the brain’s “default mode network” — the part active when we daydream — plays a vital role in creativity. Great insights often arrive in the shower or on a quiet drive precisely because the mind is given room to wander.

Families, too, benefit from deliberate rest. Children who experience unstructured play develop imagination and resilience. A growing concern for the next generation is social media. As the ‘adult’s in the room, we should all play an active role in determining how much exposure to grant such to our children. As a parent of young boys, I openly admit this is a continual battle.

Couples who guard downtime together — whether a weekly date night or simply lingering over morning coffee — build marriages that weather storms. In estate planning, we often remind clients that the goal is not merely to pass on wealth, but to preserve the health and relationships of those who receive it. That preservation is impossible without rhythms of rest.

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INTRODUCTION

We are officially in Spring People! April often feels like a second beginning, doesn’t it? The year has found its rhythm, the first quarter has passed, and the world outside reminds us of cycles larger than our calendars. Trees blossom, days stretch longer, and the promise of renewal is everywhere. But in the midst of all this remains the usual reminders of our monthly obligations – mortgage payments, salaries to be covered, vendors sending you their monthly invoices, kids screaming and reminding you of your deficiencies... Oh sorry, confused this newsletter for my personal journal for a second 😊... But you get the point!

For many families, April is a month of reassessment: Are the goals we set in January still serving us? Do we need to pivot, refine, or simply recommit? How are our professional objectives moving along? Just as spring cleaning clears our homes, April offers the chance to sweep away clutter from our plans. In our practice, this means helping clients return to the fundamentals — protecting their families, strengthening their financial houses, and finding the margin to rest. Renewal is not indulgence; it is preparation for sustained growth. Onward and upward together, let’s go!

CORPORATE TRANSPARENCY ACT – YEAR TWO COMPLIANCE LESSONS

For whatever reason, our office has come across quite a few probate matters as of late. I thought sharing some information on this subject may be of benefit for everyone. For many families, probate remains a word shrouded in mystery, not to mention expenses! The cost of living has shot through the roof in the last five years. It saddens me to say, the legal profession is no exception, and therefore families across the nation has felt that tightening as well. Probate expenses is definitely one of those ‘rising cost’ that can absolutely be prevented if you / your family are prepared for it from the start. Having been with us for some time now, you know the importance of a good estate plan. For those of you who aren’t convinced, then by all means, continue reading...



So first, what is probate? In California and across the country, probate is the court-supervised process of settling an estate after death. While its intent is to ensure fairness and oversight, the reality for most families is a procedure that is slow, costly, and often bewildering. By 2026, some reforms have streamlined certain filings, but the core challenges remain — and too many households still stumble into probate unprepared.

The first reality is cost. Probate fees are not arbitrary; they are set by statute. In California, for example, attorney and executor fees are calculated as a percentage of the gross estate value — not the net. That means a home worth \$1.5 million with a mortgage still incurs fees on the full \$1.5 million. Families often discover too late that tens of thousands of dollars will vanish to fees that could have been avoided with a trust. Multiply that across various assets, I assure you, these legal expenses accumulate quite fast.

Time is the second burden. Even modest estates can take a year or more to navigate probate. As you may very well be aware, CA is no exception, and it wouldn’t be a stretch to say it may be leading the pack! Complex estates may drag on for several years, delaying distributions to heirs and prolonging emotional closure. Court calendars remain clogged, and while some electronic systems have improved efficiency, families should not expect probate to be quick. Planning ahead is the only true way to spare loved ones from years of delay.

Privacy is another casualty. Probate is a public process. Once filed, the inventory of assets, debts, and beneficiaries becomes a matter of record. In an age where privacy is increasingly valued — and identity theft a constant risk — the public nature of probate is often shocking to grieving families. Revocable living trusts, properly funded, avoid this exposure and keep family matters confidential.

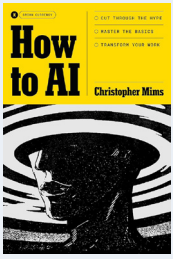
Finally, probate often strains relationships. The combination of grief, money, and legal procedure can inflame old wounds. Siblings who once got along may find themselves at odds over interpretations of a will or disagreements about timelines. By contrast, a well-drafted estate plan that avoids probate not only preserves assets, but preserves peace.

The lesson of 2026 is clear: probate is not inevitable. With proper planning — trusts, updated beneficiary designations, and attention to titling — families can bypass the system almost entirely. For those who must face probate, preparation and education soften the blow. But for those willing to plan, the gift of avoiding probate may be one of the greatest legacies you can leave. You know the drill, you know how to contact us!

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In practical terms, prioritizing rest may mean blocking one evening a week for family, protecting one weekend a quarter for a true getaway, or enforcing digital boundaries after certain hours. For leaders, it may mean modeling rest for employees, making it clear that performance is judged on outcomes, not on burnout.

As April ‘spring’ (should’ve been a comedian 😊) upon us, let it be a reminder that rest is not wasted time. It is the silent architect of excellence. By reclaiming rest as a discipline, not a distraction, we create space for the kind of performance that endures. Rest, like spring itself, renews our strength for the seasons ahead.



Christopher Mims. HOW TO AI: CUT THROUGH THE HYPE. MASTER THE BASICS. TRANSFORM YOUR WORK.

Let's be honest with one another. AI has taken over the world by storm. No matter what industry you may find yourself in, surely AI has played a role as of late. As a firm, potential clients coming in and having the 'answer' via AI has become prevalent. Might as well make the best of it, and learn how to incorporate it in our lives. Let's see what Author Mims has to say.

This book is a practical guide to understanding and using artificial intelligence in everyday work. Rather than focusing on technical details or futuristic speculation, the book explains how ordinary professionals can start using AI tools effectively today. Mims' central message is that AI should be viewed as a powerful assistant that augments human abilities rather than replacing people entirely.

The book begins by addressing the widespread confusion and anxiety surrounding AI. Many people feel pressure to use AI tools but are unsure where to start, while others worry about losing their jobs. Mims argues that these fears are understandable but often exaggerated. According to him, we are still in the early stages of AI adoption, and individuals who experiment with the technology now will gain an advantage as it becomes integrated into more industries.

A central feature of the book is Mims' set of "24 laws of AI," which provide practical principles for working with AI systems. These laws emphasize realistic expectations about what AI can and cannot do. For example, one key idea is that AI works best as an assistant rather than a replacement for human judgment. Another principle is that AI is not inherently creative, but it can help humans become more creative by generating drafts, ideas, or prototypes that people can refine. The author also recommends using AI to automate tedious or repetitive tasks, freeing people to focus on higher-value work.

Mims illustrates these ideas with real-world examples of professionals using AI in their daily work. For instance, a freelance lawyer might use AI to summarize documents or help prepare for depositions... had he mentioned estate planners, we may have officially felt threatened. Then we would have filed suit based off an AI assisted legal complaint! ... A construction company might automate the preparation of bids that once required hours of manual effort. These examples show how AI can dramatically increase productivity without eliminating the need for human expertise. Instead of replacing workers, AI often acts like a highly capable digital assistant that speeds up routine tasks and improves decision-making.

Another major theme of the book is the importance of experimentation. Mims encourages readers not to wait for perfect understanding before using AI tools. Because the technology is evolving quickly, the best way to learn is by trying different systems, testing prompts, and gradually integrating AI into existing workflows.

The book also aims to cut through the hype surrounding artificial intelligence. Media coverage often alternates between extreme optimism and dire warnings about job loss or runaway superintelligence. Mims takes a more balanced view: AI is powerful but imperfect. It can generate errors, hallucinate facts, and produce incomplete work, which means human oversight remains essential. Understanding these limitations is crucial for using AI responsibly and effectively.

In the end, How to AI is less about technology itself and more about mindset. Mims argues that the people who benefit most from AI will be those who treat it as a collaborative tool. By learning how to delegate routine tasks to AI and combining machine speed with human judgment and creativity, workers and organizations can dramatically improve productivity and unlock new forms of innovation.

Overall, the book serves as a practical roadmap for navigating the early years of the AI revolution, helping readers move from curiosity or fear to confident, productive use of the technology in their daily work.

The Joy of Minimalism



In a world of clutter — digital, physical, emotional — minimalism has reemerged not as a fad, but as a philosophy of freedom. At its heart, minimalism is not about stark white walls or owning nothing. It is about owning only what serves, what delights, and what frees us to live with clarity. Families who embrace minimalism often report less stress, more savings, and a deeper appreciation for the things they choose to keep.

Minimalism begins in the physical space. A cleared desk invites focus. A simplified wardrobe reduces decision fatigue. But it does not stop there. Emotional minimalism means pruning relationships or commitments that drain rather than enrich. Digital minimalism means setting boundaries on technology so that screens serve us, not the other way around. Each act of subtraction is an act of addition — making room for what matters most.

For parents, minimalism offers a gift to children: the reminder that joy comes not from abundance, but from presence. A family game night may outshine a pile of new toys. A shared hike may linger longer in memory than the latest gadget. Minimalism is not about deprivation, but about curation — curating a life in which the essentials have space to shine.

As April invites us to spring clean, consider extending that cleaning to your calendar, your inbox, and your commitments. You may discover that in clearing out the excess, you uncover the quiet joy that was waiting all along.

Minimalism also encourages us to reconsider our relationship with consumption. In a culture that often equates success with accumulation, choosing less can feel counterintuitive. Yet many people find that when they pause before acquiring something new — asking whether it truly adds value — they develop a greater sense of intentionality. Purchases become more thoughtful, possessions more meaningful, and the constant cycle of buying and discarding begins to slow. Over time, this shift can transform not only our homes but also our habits, allowing us to focus more on experiences and personal growth than on acquiring the next new item.

Ultimately, minimalism is less about reducing life and more about refining it. It asks us to identify what truly deserves our attention: meaningful relationships, purposeful work, time outdoors, quiet reflection, and moments of connection with family and friends. By removing the distractions that compete for our time and energy, we allow those priorities to rise naturally to the surface. The result is often a life that feels lighter, calmer, and more intentional — not because it contains less, but because what remains has been chosen with care.

FAMILY SPOTLIGHT

We are delighted to continue our "Family Spotlight" series by introducing Isaac, the youngest son of attorney Valerie Pasion.

Known affectionately at home as "Mr. Goodtime," Isaac is the heartbeat of the family's joy. Naturally charismatic and gifted at making everyone laugh, his playful energy is a constant reminder of the light children bring into our lives.

On the basketball court, Isaac's talent is undeniable. A standout 6th grader at Grace Christian School in Cypress, he serves as the starting point guard for a team primarily composed of junior high students. His leadership was instrumental in leading his school to its first-ever championship. Isaac is so passionate about the sport that he was recently featured as a guest on the "Be Ready Sports" podcast to discuss his basketball journey. Beyond school sports, he competes at an elite level with CEO, one of the top-ranked AAU teams in California, and is also a Muay Thai competitor.



While he is a fierce competitor, Isaac's character truly shines in his relationship with his younger sister, Olivia. Though he loves to tease her, his protective nature is always on display; from surprising her with her favorite toys to treating her to boba, his kindness reflects a deep devotion to his family.

Isaac's blend of humor, athletic drive, and genuine kindness embodies why we are so passionate about the work we do. Family is everything at our firm, and we remain committed to helping families stay strong.



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April reminds us that renewal is more than a metaphor; it is a practice. By reclaiming rest, planning wisely to avoid probate, finding meaning in our struggles, and simplifying our spaces, we create lives that are both lighter and stronger. We are now well into 2026, so we hope you are making the year everything you had hoped it would be!

We know the bills keep coming, we understand that wars and inflation going on around us is not making life easy. Believe us, as a small business owning law firm, we struggle with these issues on a regular basis. As usual, we simply aim to be a beacon of knowledge and (hopefully) light-heartedness along the way. Stay measured if you are going through a tough time, and remember... This too shall pass!

As you step into this season, may you find the clarity that comes from subtraction and the strength that comes from rest. Renewal is here — let it prepare you for the growth ahead.

