

BIER LAW BULLETIN

Be Informed. Be Prepared. Be Free.

Each month, our goal is to offer you valuable insights for maintaining an up-to-date estate plan, share some personal and firm highlights, and introduce you to one of your local experts. We also welcome your input on subjects you'd like to delve deeper into; simply respond to this email and let us know what might interest you!

[Seth and Leann Bier](#)

Things and Stuff

Recent News and Upcoming Events

DON'T LET THE "WHAT IF'S" KEEP YOU UP AT NIGHT

You've thought about it. You know you should address it. Yet, somehow, it always gets pushed aside. The complexities of Wills, Trusts, and Probate loom over many of us, leaving questions unanswered and loved ones vulnerable. Here's your chance to finally take control -- and from the comfort of your home.

Wills, Trusts, and Probate: Everything You Need To Know

Date: Wednesday, November 13
Time: 5:30 p.m.

[CLICK TO REGISTER](#)



2024 AAEPF FALL SUMMIT RECAP

A huge thank you to the American Academy of Estate Planning Attorneys for an incredible Fall Summit at the Coronado Island Marriott Resort & Spa! We are very fortunate to be a member of this prestigious organization and always look forward to this twice-a-year event.

This summit brought together top estate planning professionals from across the country for four days of networking, learning, and collaboration. The educational sessions over the four days helped Seth stay informed on the latest estate planning developments, trends, and best practices.

Collaborating with attorneys and staff from firms nationwide was an invaluable experience, allowing us to continually improve and deliver exceptional service to our clients. And, of course, it wasn't all work -- we spent time with friends old and new, enjoyed the beautiful surroundings, and had some delicious food!



TED TALK

A Pawsitively Exciting Update ~~on~~ FROM CEO (Chief Excitement Officer) Teddy Bier!

You guys! It's my ONE-YEAR ANNIVERSARY from the day I joined the Bier Law home office! The Lawyer and the Boss say it's been quite a year, but I can barely remember what happened yesterday lol. For my anniversary present, they let me go to ADVENTURELAND for FIVE WHOLE DAYS!! I guess they had to go somewhere for work and didn't need my Chief Excitement Officer expertise. Lucky Me! So here are some photos from my awesome vacation!



Asked and Answered

This month's FAQs. Click for answers!

Want to see one every Friday? Follow us on [Facebook](#) or [Instagram](#)!

Can I control when my Durable Power of Attorney takes effect?

I'm my mother's Durable Power of Attorney Agent but her bank won't honor it. What can I do??

What should I look for in an estate planning attorney?

We finally want to do this. How much do you charge?

Knowledge is Power

Highlighted Articles, Blogs, & Reports

ARTICLE: BEWARE OF SCAMS TARGETING OLDER ADULTS

Scammers often exploit qualities like trust, kindness, and a desire to help others, making older individuals prime targets. Unfortunately, even with experience and caution, older adults can find themselves caught in schemes that appear authentic, whether through seemingly legitimate emails, "urgent" phone calls, or deceptive online offers.

This article from the National Institute on Aging provides valuable insights into common scams and what you can do to protect yourself and your loved ones.

[READ THE ARTICLE](#)



The Expert Exchange

Conversations with Local Professionals

Get to know a little more about the experts in our community.

Sarah Winfrey Family Planning Advisor [Coastal Funeral Center](#)

What do you do?

I am a family planning advisor at Coastal Funeral Center, a sister company of Green Hills Memorial Park. I work with families to explore their advanced planning options so that decisions are made in a relaxed environment, provide peace of mind with future financial protection, and give your family confidence in your choices.

What's the best part of your job?

The best part of my job is getting to know families – Whether they experience a loss or when we are planning far in advance, I enjoy learning about the people and families that come into our care.

What's the most common misconception people have about your industry?

I often see it when people walk into Coastal. They expect the type of people and mortuary/funeral home that they see on movies and TV – dark wood and sober atmosphere. Here at Coastal Funeral Center our coastal color palate and décor are calming and peaceful, and our caring team works to create a perfect service for our families.

What would people be surprised to learn about you?

I think that I've studied music for 25 years and actually gone to college for it as a performance major. I eventually changed to communications, but I sang in a band for five years in Long Beach.

What's your favorite local restaurant?

Oh, that's hard to pick – I have two: [Gaetano's](#) and [The Arthur J.](#)

