

BIER LAW BULLETIN

Be Informed. Be Prepared. Be Free.

Each month, we share practical tips for keeping your estate plan up to date, a few personal and firm highlights, and an introduction to one of our favorite local experts. If there's a topic you'd like us to cover in a future issue, simply reply to this email—we'd love to hear from you.

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What's Happening

Recent News and Upcoming Events



[**>>> Reserve My Seat**](#)

TASTES & TRUSTS RETURNS JULY 15

Estate planning seminars have been around a long time.

This isn't one of those.

Instead of slides filled with legal terms, you'll follow the story of a family and see what happens when they make different planning choices.

By the end, you'll understand more about Wills, Trusts, probate, and incapacity planning than you thought possible in a single evening.

And yes, there's a mini wine tasting too.

Join us July 15 at Total Wine & More.

NOT ABLE TO JOIN US IN PERSON?

That's okay.

Our on-demand webinar follows the same story-based approach we use in our live workshops.

Instead of legal jargon and complicated explanations, you'll follow a family through a series of planning decisions and see how those choices affect the people they care about.

By the end, you'll have a clearer understanding of Wills, Trusts, probate, and incapacity planning—all on your own schedule.

Watch anytime. Pause when needed. Learn at your own pace.



[**>>> Watch the Free Webinar**](#)

TED TALK

A Pawsitively Exciting Update from CEO (Chief Excitement Officer) Teddy Bier!

Well friends, it has been a rough month.

It all started with a trip to the vet. Apparently my enthusiasm for life had become a topic of concern. The diagnosis: inflammation and possible tears in both knees. The prescription: less excitement.

The next thing I knew, I was placed on what can only be described as **involuntary disability leave** from Bier Law. No running. No jumping. No zoomies. No Adventureland. No chasing squirrels. In other words, no Chief Excitement Officer duties.

The Boss and the Lawyer took my recovery very seriously. They even bought me a ramp so I wouldn't have to jump on and off the bed. I reviewed the ramp and determined that jumping over parts of it was much faster.

This led to what the medical community refers to as "**an incident.**"

I injured a toenail badly enough that it had to be removed, and suddenly I found myself wearing a bandage, a boot, and—worst of all—a Cone of Shame.

Friends, I did not care for the Cone of Shame.

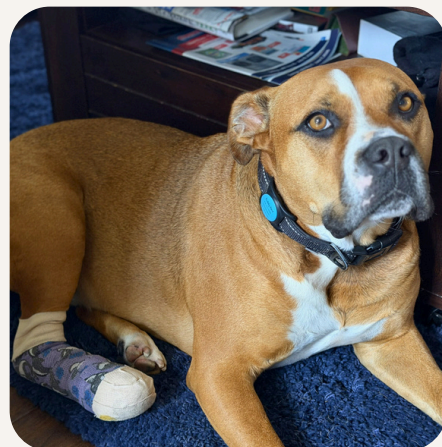
The good news is that I'm feeling much better and may avoid surgery altogether. Unfortunately for the local squirrel population, I am returning to active duty. 🐾



My civil liberties were suspended.



I requested a second opinion.



The incident remains under investigation.

From Seth's Desk

Real questions. Plain-English answers.

DEAR SETH,

IF I ADD MY DAUGHTER TO MY BANK ACCOUNT, WON'T SHE JUST SPLIT IT WITH MY OTHER CHILDREN WHEN I'M GONE?

– LOOKING FOR A SHORTCUT



Not necessarily. When someone is a joint owner on a bank account, the money generally belongs to the surviving owner. If your daughter later shares that money with her siblings, she's typically making gifts from her own assets—not carrying out your estate plan.

Just as importantly, you're relying on everyone to agree about what you intended. Even when everyone is acting in good faith, memories and expectations don't always match.

This is a common example of how good intentions can lead to unintended consequences. A decision that seems simple can create legal, tax, and family issues you never expected.

That's why estate planning works best as a complete plan, not a series of shortcuts. I discuss several other common DIY estate planning pitfalls in [this month's featured blog](#).

Have a question for Seth? Reply with ASK SETH.

Knowledge is Power

Highlighted Articles, Blogs, & Reports

BLOG: THE “I ADDED MY KID TO MY DEED” MISTAKE

Seth hears this more often than you might think. While it's usually done with the best intentions, changing one piece of your estate plan without understanding how it affects everything else can lead to unintended consequences.

In this month's article, Seth explores one of the most common DIY estate planning pitfalls—and why estate planning works best as a coordinated plan.

>>> [Read the full article](#)



The Expert Exchange

Conversations with Local Professionals

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

Julie Sampras **Director of Development** **[Long Beach Ronald McDonald House](#)**

What do you do?

I have the privilege of connecting our community to the mission of Long Beach Ronald McDonald House, which provides free lodging, care, and support to families with critically ill children receiving treatment at nearby medical facilities. As Director of Development, I lead fundraising efforts, build community partnerships, and oversee special events.

What's the best part of your job?

I love the fact that my office is located at the Ronald McDonald House and that I'm able to interact with the families daily. I also love seeing the bonds that are created here between families, siblings, patients, etc. While each circumstance is different, they all have the same common thread, which is a child in serious medical care.



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

A common misconception specific to Ronald McDonald House is that we are owned or funded entirely by McDonald's. McDonald's is our founding + forever corporate partner and generously provides a portion of our funding; most of our support comes from individuals, corporations, foundations, and community members.

What would people be surprised to learn about you?

I'm married to a Greek and have spent years embracing the culture. I consider myself an honorary Greek, or a wannabe Greek! I went to Greek school for a year and can speak/read just enough to introduce myself and order a glass of wine.

What's your favorite local restaurant?

Can't pick just one...In South Bay, I love [Wildflower Café](#) for breakfast/lunch. In Long Beach, [La Parolaccia Osteria](#). For Greek food, [Taverna at the Mar Vista](#).

Know someone who should be featured? Reply and let us know.