

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 Your Seat](#)

FREE ESTATE PLANNING CLASS RETURNS JULY 15

Mark your calendar for Wednesday, July 15, when Tastes & Trusts returns to Total Wine & More in Redondo Beach.

If you've been meaning to learn the basics of estate planning in a relaxed, no-pressure environment, this is a great opportunity to do so. Seth will walk through the differences between Wills and Trusts, explain how probate works in California, and answer questions along the way.

This is **one of the few remaining opportunities to attend a live Bier Law workshop in 2026**, so if you've been thinking about joining us, now is the time.

FROM CLASSROOMS TO CAFÉ DU MONDE

In May, Seth and I traveled to New Orleans for the American Academy of Estate Planning Attorneys Spring Summit, where we joined estate planning attorneys from around the country to learn, collaborate, and share ideas.

Of course, we couldn't visit New Orleans without doing a little exploring. With the help of fellow Academy members Chip and Kim Morrison of [Morrison Law Group](#), we enjoyed our first beignets at Café du Monde, wandered through the French Quarter and Pirates Alley, and even braved a classic New Orleans downpour during the Academy's riverboat cruise!

We returned home with new ideas, great memories, and a few stories we'll be telling for years.



TED TALK

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

The Boss and the Lawyer took me back to Idyllwild last month for what they called a "mountain getaway." Personally, I prefer the term **working vacation**.

There were trails to patrol, squirrels to monitor, and lizards to investigate. The squirrels remained frustratingly uncooperative. The lizards showed promise but lacked commitment.

Every morning, I headed out into the wilderness for important field research. Every afternoon, I was rewarded for my service.

There were treats from [Amelia's Donuts](#), doggy ice cream from [Idyllwild Ice Cream & Jerky](#), steak from [Ferro](#), puppy patties from [Idyllwild Brewpub](#), and at least 47 compliments from strangers. By the second day, I had developed a loyal following.

Between appearances, I spent my time hiking, stalking squirrels, and managing the local lizard population.

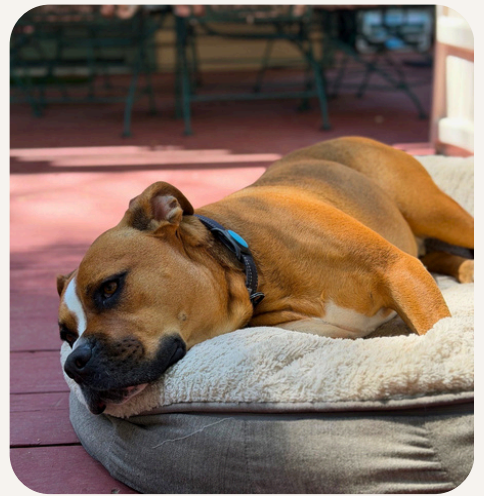
It was exhausting. 🐾



The job never ends.



A restaurant that gets me.



No regrets.

From Seth's Desk

Real questions. Plain-English answers.

DEAR SETH,

HOW OFTEN SHOULD I UPDATE MY ESTATE PLAN?

– SIGNED, SEALED, FORGOTTEN

Great question. In fact, this is one of the most common misconceptions we see. Many people assume estate planning is a one-time event.

Life changes. Families change. Assets change.

And sometimes the people you trusted five, ten, or twenty years ago aren't necessarily the people you'd choose today.

In fact, one of the most common things we hear is: "Honestly... I don't even remember exactly what my trust says." That's more normal than you think.

Many people haven't reviewed their documents in years. Successor trustees move away, relationships evolve, beneficiaries change, and plans that once made perfect sense slowly drift out of alignment with real life.

You don't always need a complete overhaul. But it's smart to review your plan every few years — or anytime there's a major life event like a marriage, divorce, move, birth, death, or significant financial change.

A good place to start: Pull out your current plan and ask yourself one question: "If something happened tomorrow, would this still work the way I want it to?"



Have a question for Seth? Reply with ASK SETH.

BLOG: 7 TIMES TO REVIEW YOUR ESTATE PLAN

“We handled all that years ago.”

That’s what one gentleman told Seth at a recent community event when he walked past our booth. But when Seth asked a few simple questions, he realized the estate plan he created when his children were young might not reflect his family today.

In this month’s article, Seth shares 7 reasons it may be time to review your plan.

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



The Expert Exchange

Conversations with Local Professionals

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

Jane Lau

Realtor, SRES, Certified Probate and Trust Specialist
[Berkshire Hathaway HomeServices CA Properties](#)

What do you do?

I help seniors and families in Palos Verdes and the South Bay right-size with confidence—with a hands-on approach I guide them through downsizing, preparing and selling the family home, and connecting them with trusted resources to make the process as smooth and stress-free as possible for both sellers and buyers.

What’s the best part of your job?

I am a total people-person, so... The most rewarding part of my job is helping clients through major life transitions with compassion and care. Knowing I can reduce stress, provide reassurance, and help families move forward with confidence during an emotional time is incredibly meaningful to me.

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

One of the biggest misconceptions about real estate is that agents simply “sell homes.” In reality, and what I enjoy most is that we’re advisors, negotiators, problem-solvers, and guides through major life transitions—helping clients navigate emotional, financial, and logistical challenges while making the process as smooth and stress-free as possible.

What would people be surprised to learn about you?

I’m a proud boy mom to five sons, ran my first half marathon last year, have visited the Taj Mahal eight times, and start every morning with a gratitude journal—because coffee alone isn’t enough to keep up with my life! Fun Fact: I love to volunteer in the local community, including making Birthday Calls for the Peninsula Seniors – I sing Happy Birthday to the lucky recipients, and that usually gets them giggling! ❤️

What’s your favorite local restaurant?

Breakfast and coffee at [Yellow Vase](#) is my happy place, and lunch at [Giorgio's](#) never disappoints. But if I’m cooking at home, it’s Indian food all the way—I could happily live on curry, naan, and chai seven days a week!



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