

MontereyTrust.com

Trust & Estate Planning
Professionals of Monterey
& Santa Cruz, California

Planned Giving

PHOTOS COURTESY OF DOUGLAS STEAKLEY

CONTINUING EDUCATION CALENDAR

DIRECTORY OF PROFESSIONALS

PUBLIC FORUM

CALENDAR (PUBLIC)

SCAMS & ALERTS

BECOME A MEMBER

BRIEFS

Elder Scam:

A report has come in to senior legal services that bogus checks have been arriving in the mailbox of some local seniors. The checks appear legitimate, but when cashed, are bounced and subsequently the victim, the senior, can be held responsible for replacing the funds. (See Elder Scams for more)

SIGNIFICANT CHANGES IN CALIFORNIA REGARDING NOTARY PUBLICS BECOME EFFECTIVE JANUARY 1, 2008

The changes are set forth in AB 886, which was chaptered by the Secretary of State on October 10, 2007 - Chapter 399, Statutes of 2007. The following are among the new changes and enforcement measures. ([Read more](#))

The CPE Forum is having its Fourth Annual Estate Planning Event at the Steinbeck Center on Nov. 9. (See [Calendar for more](#)).

The Monterey and Santa Cruz area is fortunate to have many estate planning professionals who have dedicated their professional lives to being leaders in their field and true contributors to their communities. This site represents the best of our estate planning professionals and offers our community current information on issues affecting us in trusts, estates, probate, investments, tax and financial planning.

CONTINUING EDUCATION CALENDAR

Jan. 16, 2008: DeLaveaga Golf Course and Country Club House in Santa Cruz. "Life Settlements: Pros & Cons" ([more](#))

January 24, 2008: Annual Tax Update with Gary McBride. Corral de Tierra Country Club, Salinas ([more](#))

SCAMS & ALERTS

Legal Services for Seniors has been of Assisting victims of a recent check scam (More)

The Monterey County District Attorneys Office Elder Abuse Prosecution Unit is reporting (More)

PUBLIC FORUM

Q: I would like to name my son as my Trustee. Do I need to ask his permission or have him agree to be named?

Q: I'm concerned that no one will take care of my cat after I'm gone. How can I make sure Timmy is taken care of for the rest of his life?

PUBLIC EDUCATION CALENDAR

Oct. 24, 2007 – The Hospice Foundation of Monterey is hosting a seminar "Being Named as Trustee (More)

Nov. 13, 2007 – The Carmel Foundation ..

SIDEBAR



ESTATE PLANNING
FOR PETS



PLANNED GIVING &
CHARITABLE BEQUESTS



ESTATE PLANNING
& TRUSTEES



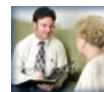
TAXES & TAXATION



CRITICAL CHOICES
FOR HEALTH CARE



FAMILY OFFICE



AGENCIES:
WHO DOES WHAT

The information provided on this website is intended as general reference information only, and is not intended to be a substitute for professional advice based on a particular or factual situation. The information on this web site does not constitute professional legal advice, accounting or tax advice and should not be interpreted as such. Although we have made every reasonable effort to ensure that the information provided is accurate, MontereyTrust, its Members, shareholders, managers and staff, make no warranties, expressed or implied, on the information provided on this web site. The user of the information contained herein accepts it as is and assumes all responsibility for its ultimate use.

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MONTEREYTRUST.COM

The MontereyTrust.com website has been developed with two main goals in mind. First, the public side of the site provides a Directory of Members which the public can access to find qualified professionals to help with legal, tax, trust and planned giving concerns. The public portion of the site also provides a forum to ask questions of Members, topical articles written by Members, reports on current elder abuse scams in our area, and a calendar of local public events pertaining to the estate planning, tax, planned giving and trust fields.

The Members side of the site provides a calendar of events which lists continuing educational opportunities for professionals in the Central Coast Area. This calendar is accessible by non-members and is listed on the home page of the site. Through the Members Only portal, Members can read summaries and reviews (written by other Members) of current publications relevant to the estate planning, trust and tax field, Members can post “help needed” or “space for rent” ads for other Members and, perhaps most importantly, Members are given a forum to ask questions of other Members, report on recent developments or legal issues that may effect our clients, and to share ideas and concerns.

Members are invited from the Monterey and Santa Cruz areas and will consist of attorneys, CPAs, Trust Professionals (both Private and Corporate) and Planned Giving Professionals.

PUBLIC SERVICES

Directory of Professionals

The Directory of Professionals will list Members along with a photo, profile of the Member, areas of practice and link to webpage, publications and other notable information. Members will be encouraged to post information on publications, links to personal website* and other relevant information such as an AV rating from Martindale Hubble. Non-Members will also be listed, but only name, address and phone will be provided.

The site will provide a search capability by name, profession, location, types of work done, etc

If a Member does not have a personal website, a site can be created for the Member which will then be hosted at the MontereyTrust site. See below for additional information and cost.

Public Education Calendar

This Calendar will provide a listing of public educational events in our area. Carmel Foundation, Hospice of the Central Coast and Members will be asked to list educational events pertaining to trust, estates, tax and planned giving.

Public Forum

The Forum provides an opportunity for members of the public to submit questions to Members for response. Before submitting the question, the Public Person will need to “Agree” that the response to the question does not represent an attorney / client relationship, or legal or tax advice and agrees to hold harmless the site, the Member, etc for any liability incurred as a result of the advice. The Public Person is advised to seek legal or tax council prior to taking any action based on the information provided by the response.

Questions must be general in nature and will be reviewed prior to posting. Members will be asked to reply and the question and answer will be displayed on the site.

Scams & Alerts

Reports on current scams affecting our senior communities will be obtained from Legal Services for Seniors, the District Attorney’s Office, and other sources and will be posted at the site on a regular basis.

Sidebar

Articles will be written and submitted for publication by Members. Members are encouraged to write technical or non-technical articles of any length discussing current issues. Articles will be reviewed by a committee and MontereyTrust has the right to decline publication of Member articles. The purpose of such review is to ensure the highest quality of publication.

The Article will be linked to the submitting Member's Directory site, the Member's web site and other articles written by this Member will be listed.

The Sidebar is accessible by the public and therefore articles written by Members should be for public consumption.

MEMBERS ONLY

The Members Only portal allows Members entry into the interior of the site reserved for Members. This entry is password protected and annual dues are required to access this portal.

Continuing Education Calendar (For Attorneys, CPAs and other Members or Potential Members)

The Continuing Education Calendar will list dates and events on the Central Coast including but not limited to those offered by the following organizations:

- Monterey and Santa Cruz Estate Planned Study Group
- Monterey County Bar Association Trust & Estates Group
- Continuing Professional Educational Forum (CPE Forum)
- Continuing Education of the Bar (CEB)
- Financial Planning Association
- Monterey College of Law - Estates & Taxation courses
- Planned Giving Council

Links to the organizations' web sites will be displayed for further information, membership and registration for events. Web page development and hosting will be available for non-profit educational groups at MontereyTrust.com.

This Professional Continuing Education Calendar for the current month will be on both the Public and Members Only site; the Members Only site will have the full year's events.

Bulletin Board

The Bulletin Board will give Members an opportunity to post an ad, at no cost, listing “I’ve relocated”, “help needed”, “looking for Associate”, “office space for rent”, “we’ve moved”, etc.

Discussion Forum

The Discussion Forum provides a “private chat room” for Members. Members can post informative discussion, questions, suggested reading and other information intended only for other Members. Other Members can respond, add information, or simply read about issues affecting other Members.

These items will not be monitored and the author will be identified; inappropriate discussion will be removed and the posting party advised.

Review of Current Publications

Members will be encouraged to review current publications and post recaps of articles, books, informative web sites, etc.

Membership

Members will include attorneys, CPAs, Private and Corporate Fiduciaries, and Planned Giving Professionals in the Monterey, Santa Cruz and San Benito areas.

Membership Cost

\$125 per year for single Member

Firm Memberships:

Initial Member	\$125 per annum
Up to 5 Firm Members	\$125 for first Member, per annum \$ 50 for each additional Member, per annum
Firm of 5 -10 Members	\$125 for first Member, per annum \$ 25 for each additional Member, per annum

(For firms of 10 or more, cost is negotiated)

Webpage Services

Webpage development \$300

(For sole practitioner; firms with multiple associates may be more)

Webpage hosting \$150 per annum

(Includes one update per year, thereafter \$25 per hour)

Email box hosting services are also available.

Marketing of Site

Marketing of the site will include links from reciprocal web sites, newspapers and direct mail targeted at our senior communities.

The MontereyTrust.com web site's goal is to serve as a conduit among the many estate planning, trust and tax professionals in our area. The secondary goal is to provide information to our community and a directory for both professionals and individuals to find attorneys, CPAs and other trust professionals in our area.

Go to MontereyTrust.com (will be launched January 2008 or email me at liza@montereytrust.com)