

Law Office of Alan D. Davis Newsletter

VOLUME 1, ISSUE 1

WINTER, 2006

Welcome to the initial newsletter of Alan D. Davis, Attorney at Law

Thanks for reading the inaugural newsletter for my law office. I've been in practice for over 27 years in California. During that time, I've handled such diverse matters as criminal defense, family law, landlord/tenant problems, civil litigation, bankruptcy, and estate planning.

I'm a native of New Jersey, and graduated from Rutgers University in 1968 with a BA in history. Following graduation, I served in the U.S. Navy for almost six years as a data systems technician. I spent the last three years aboard the U.S.S. Josephus Daniels based in Norfolk, Virginia.

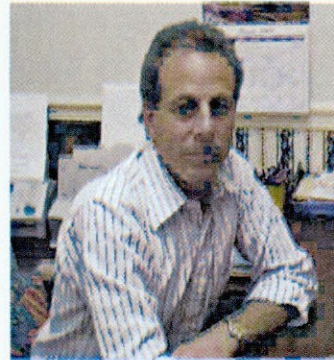
After my discharge, I enrolled in Western State University School of Law in Fullerton, California, graduating in 1978. I was admitted to the bar in November of that year and began a general practice of law. For

the past twelve years I've focused on probate and estate planning. However, I also handle other types of cases, such as guardianships, conservatorships, and civil litigation.

Since 1981 I've taught probate law and procedure at Santa Ana College in their certificate program. The text used by the class was written by me specifically for students. And, instead of having to purchase the book, students can download it for free off the internet!

If you'd like to schedule an appointment to see me, call me at (714) 614-0422. If you're out of the area, call me toll-free at (800) 728-LAWS.

Do you need a loan? How about a handyman? Tired of not hearing from your insurance company? If you need a professional and don't know where to turn, call me. I know people who can help.



***Plan your estate
with me and
your attorney
won't inherit a
fortune!***

What's a Probate?

I am often asked: "What's probate?" The short answer is that probate is a legal procedure to transfer property from a deceased person to his or her heirs. The primary factor in determining whether a person's estate must be probated is the

amount and type of property that the deceased person owned. California, for example, has what's called summary probate, in which estates up to \$100,000 can be transferred without a full-blown legal action. If mom dies with \$95,000 in a C.D.,

and has no other major assets, her heirs can obtain the money by use of an affidavit procedure. On the other hand, if mom's estate consists of an unimproved lot in Pacoima worth \$105,000, a full probate will be required. The advantage of summary

probate is that the amount of time involved is only a few weeks, versus almost a year with the average probate.

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THESE ARE SOME OF THE AREAS THAT I CAN HELP YOU WITH:

- Estate Planning—Living Trusts, Wills, Powers of Attorney, Health Care Directives
- Probate
- Real Estate, Landlord/Tenant, Deeds, Mortgages
- Civil Litigation
- Guardianship and Conservatorship
- Refinancing or selling your home

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*You don't have to live
on an estate to plan
one!*

We're on the web:

www.probate-expert.com

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Will or Trust?

At a minimum I advise my clients to have a will prepared so that their wishes for the disposition of their estates is clear. Without a will, the state decides who inherits. But I also advise many of my clients to have a living trust instead of a simple will. The benefit of a trust is that probate can be avoided—and there may be some tax savings. Setting up a living trust is a little like starting your own company. As your attorney I can draw up a document that declares that you are transferring all of your assets to your trust, and that you are going to be the manager or “trustee.” On your death, the trust assets will transfer to your heirs without having to go through any court

procedures.

Typically, a trust can save someone thousands of dollars in fees and court costs. For example, probating a house worth \$500,000 would cost \$13,000 in attorney fees, plus court costs of \$1,000 or more. A trust avoids probate and the fees and costs associated with it. In addition, a trust generally can be settled in a few weeks.

Since everyone's estate is a little different from their friends and relatives, it's important to review your situation with an experienced attorney such as myself.



“...a trust can save someone thousands of dollars in attorney fees and court costs.”

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