

# The State of the Estate

DECEMBER 2015



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**IN THIS ISSUE**

**PAGE 2**

Juliet's Corner  
Super Lawyer

**PAGE 3**

A Different New Year's  
Resolution for 2016! (cont.)

Southern Sweet Potato  
Casserole

**PAGE 4**

Congratulations

## Reasons a Trustee May Be Replaced

A trustee is a person who is endowed with legal ownership and management of a trust's assets, for the benefit and protection of the trust's beneficiaries. But there are a number of circumstances that can lead to the replacement of a trustee:

- The trustee acts in a manner that harms the value of the trust's assets or the interests of the beneficiaries.
- The trustee fails to uphold the terms of the trust.
- The trustee decides to resign during trust administration.
- The trustee is declared incompetent by a court of law.
- The trustee is placed under a conservatorship, which means that another person has been granted court-ordered authority to manage the affairs of the trustee, who can no longer make their own decisions about finances.
- The trustee files for bankruptcy during the course of trust administration.
- The trustee dies during trust administration.



Beneficiaries wishing to replace a trustee must petition the probate court and attend a court hearing. In some cases, the process of trustee removal can be complicated and is not guaranteed, as the court places great weight on the choice of trustee made by the creator of the trust.

If you have any questions or concerns about trust management and/or the actions of a trustee, contact the experienced trust and probate attorneys at the **Grossman Law Firm—888-443-6590**.



**Design Tips**  
from  
**Vanessa Banks**

## A Different New Year's Resolution for 2016!

This year, instead of making that same old New Year's resolution of losing those ten pounds or going to the health club three times a week, resolve to give your home a New Year's face lift!

These design tips should serve you well as you move towards an updated, fresh new look for your home:

Start a file of magazine pictures of rooms that you like. Even if you can't exactly pinpoint why you find a room setting so appealing, your decorator will be able to quickly understand the feel that you want for your home.

Continues on page three.



Scott and I finally had a chance to experience one of the most unique golf courses in the United States, the Journey at Pechanga in Temecula. We were paired up with two others to form an impromptu team in the Husky Cup, a tournament to support Jane's school, Hillcrest Academy.



I love golf but rarely get a chance to play and am not very good. Scott has good natural potential but he doesn't enjoy it like I do and only does it when I drag him out to the course. We were paired up with an elderly man who plays weekly but is, well, elderly, and his son-in-law, who is usually a good golfer but was recovering from injuries in a recent car accident. Sadly, they were still way better than we were.



Out of the 50 or so participants in the tournament, I learned that morning that I was the only woman. I enjoyed the advantage of getting to hit from the farthest-front tees.

Pechanga is a fascinating course because it's completely integrated into the age-old natural beauty and traditions of the Luiseno people who were the area's first inhabitants. There are sheer drop-offs and steep cliffs, because the course designers preserved the natural elevations that are actually part of traditional legends.



There's an area where golfers can see ancient grinding stones, which the Luiseno used to grind acorns into flour. There are covered bridges, fish ponds, and kiicha huts, which are replicas of small native houses that Luiseno children have built during cultural lessons.

We didn't win the tournament, or even place very well. Scott did win a giant bottle of holiday red wine from Ponte Winery in a putting contest, though, and we had a once in a fascinating day.

## We are pleased to announce that SCOTT GROSSMAN has been selected to the 2016 CALIFORNIA SUPER LAWYERS list.



Each year, no more than five percent of the lawyers in the state are selected by the research team at Super Lawyers to receive this honor. Super Lawyers, a Thomson Reuters business, is a rating service of outstanding lawyers from more than 70 practice areas who have attained a high degree of peer recognition and professional achievement.

So we are happy to share that Scott Grossman exceeds the standards to reach Super status. Scott Grossman is a certified specialist in Estate Planning, Trust, and Probate law. The firm focuses in the area of Trust, Estate, and Probate Litigation in California, Scott Grossman has the ability and the concern for his clients to take time to review information and discuss with potential clients the best possible choice for them to pursue.

“A Different New Year’s Resolution for 2016!” continued from page one.

Involve your professional decorator at the very beginning of your project. Doing so will help you avoid the costly mistakes that many homeowners make. The most successful decorating projects are those where the decorator and homeowner work together.

- Your first goal should be to design your home to suit the way you and your family actually live. Maybe it’s time to relocate some activity centers and redirect some traffic patterns.
- Be realistic when determining the amount you plan to invest in the project. If you haven’t redecorated in several years, you may need to acquaint yourself with today’s pricing to determine your budget range.
- Resist the urge to repaint your interior as the first step in your new look as painting your walls first will severely limit your choices in fabric selections.
- Forget matching sets of furniture and mono-chromatic “safe” schemes. A far more interesting look is a room of complementing wood pieces and companionable fabrics in exciting complementary colors.
- Lamps, area rugs, candles and other accessories are all opportunities to keep rooms feeling light and welcoming. Use many different textures, materials and surfaces to add interest to your space.
- A well planned room will have lighting at varying levels and intensities appropriate to the activity of the area

This is one New Year’s resolution that you and your family will be pleased you kept for years to come.

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## Southern Sweet Potato Casserole

Have you ever wondered if food is really better in the South? Well when it comes to sweet potato casserole, the answer is Yes! Not much can compete with the downhome southern goodness that a serving of **sweet potato casserole** offers.

Very contrary to much of my southern upbringing, I am going to share my family’s recipe for our casserole. In the South this is a big part of the meal, you can mess up parts of the meal, but this is a deal breaker.

Just don’t tell my mama I shared her family recipe!

### Ingredients

- 3 ½ cups mashed sweet potatoes (for some reason y’all call them yams)
- ¾ cup sugar
- 2 eggs
- 1 tsp vanilla
- 1 stick melted butter (1 cup)

### Topping

- 1 cup brown sugar
- ½ cup butter
- ⅓ cup flour
- 1 cup pecans

Bake at 350 degrees for 30 minutes

*Submitted by Rachel Campbell, Marketing Director (Originally from NC)*





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## The Husky Cup



See page 2

This newsletter is intended to educate the general public about probate, trusts, wills, and other issues. It is for information purposes only and should not be construed as legal advice. Prior to acting on any information contained in this publication, you should consult with experienced, competent counsel regarding your specific situation.



**We are so pleased to  
announce that our own Rosey  
Martinez is now married!  
Rosey married her longtime  
beau on November 28th.**

**We wish them all the  
happiness and love that their  
lives can possibly hold!**

**Congratulations to you both**

**Rosey and Louis Garcia!**