RR ESTATE PLANNING & NOTARY SERVICES

TRUSTS · WILLS · NOTARY · DEEDS



ROBIN ROSENZWEIG

RR ESTATE PLANNING AND NOTARY

619.977.2770 - robinbenaylda@gmail.com

www.estateplanningandnotary.com

Estate planning is more than just paperwork - it is a thoughtful act of protection - an essential way to safeguard your loved ones and assets and it is my passion. Thoughtful planning allows your loved ones to focus on what truly matters—honoring your legacy with love. A professionally prepared estate plan avoids court intervention and loss of a percentage of your estate, control, family disputes, burdensome costs and provides relief and peace of mind. Honestly, not doing your estate plan is filing a lawsuit against the people you love in advance, to be litigated upon your death. People delay creating an estate plan due to perceived expense, a fear of death, lack of knowledge and other personal reasons. In most cases, a high-priced attorney is completely unnecessary and the estate plans you will receive are many times not comprehensive. I am a registered, bonded and insured Legal Document Assistant (LDA) and use attorney software - not Legalzoom or self-help software. I'm also a notary so I provide the full package from A-Z. With more than 35 years in the legal field I am not a legal aid services but serve the gap between costly attorneys and legal aid, which is most of us. Sadly, I have experienced many losses in my own family – my mother, stepmother and my only sibling, my sister, so I'm extra compassionate and care about all my clients.

Under California Business & Professions Code §6400-15, we LDAs are a true profession stemming from a group of paralegals in the Bay Area 35 years ago who embarked on a fight to have their own businesses, no longer wanting to be be chained to attorneys; whereas a paralegal must work under the supervision of an attorney. We are regulated by the California State Bar and California Department of Consumer Affairs. These courageous professionals fought for their rights until it became a true profession under §6400. To become a registered LDA, we must prove our legal experience and although we cannot give legal or financial advice that in almost all cases is unnecessary, people don't need an attorney. If they do, I will provide referrals and if I know they are on the wrong track, I provide attorney legal information to give clients the knowledge to make their own smart decisions.

I am a proud member and President of the San Diego chapter of CALDA, the California Association of Legal Document Assistant, the organization responsible for lobbying, protecting our profession and providing our required MCLE yearly education and mentorship. By creating your revocable living trust, deed to your trust, you safeguard your home and assets from probate court. Naming beneficiaries and guardians for your children, establishing a Will, a Power of Attorney and Advance Healthcare Directive provides certainty and ensures your wishes are honored with compassion for your loved ones.

RR ESTATE PLANNING & NOTARY SERVICES

TRUSTS · WILLS · NOTARY · DEEDS

LET'S TAKE CARE OF YOUR ESTATE PLANNING ! HERE IS WHY IT IS CRITICAL!

No Trust to protect your family, home and assets from costly, lengthy, stressful probate court proceedings, no beneficiary designations and potential for conflict among family members as they grieve your loss? That means your family could spend years in expensive probate court while the State takes a big chunk. Meanwhile, they'll be scrambling to cover your mortgage and bills with no access to your accounts.

No Trust so no Grant Deed into your Trust? Welcome your family to probate court!

Not even a Last Will & Testament to guide the judge? Wills are often misunderstood as being enough. Yes they are great to guide the judge but your family is still heading to probate court!

No Guardian nominated for your children? That means the court could end up deciding who raises them — not you. And where will they be until you are better or they have figured it out? You probably don't want to know the answer to this question.

No Power of Attorney to designate those you entrust to handle your financial affairs should you become incapacitated and unable to do so? That means your mortgage company, bank, and utilities won't wait while you're incapacitated to get paid. Your loved ones will be left not knowing what to do or how to handle your bills.

No Healthcare Directive to lay out your wishes for your health care and designate who will make life changing decisions for you when you cannot, and so that your loved ones may communicate with medical staff about your condition? That means your family can only guess what you would have wanted — and live with the guilt of those heart wrenching decisions.

Or… you can take care of this now with me and get a comprehensive, detailed, professional Estate Plan using the same legal software as many attorneys (no Legal Zoom around here) at a much lower cost than attorneys!

If your answers to these questions are no, or not yet, or I've been avoiding it, let's begin protecting your loved ones and assets right away!

ROBIN ROSENZWEIG
RR ESTATE PLANNING & NOTARY
619.977.2770 - robinbenaylda@gmail.com
www.estateplanningandnotary.com

Legal Document Assistant #199, San Diego County Reg., exp. 2/4/28 - Notary Public Commission #2194046
A Legal Document Assistant is not an attorney. I can only provide self-help services at your specific direction and cannot provide legal advice or represent you in court.