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to Maintain Lifestyle
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Independence

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A PROFESSIONAL CORPORATION

Specializing in Elder Care,
Trusts & Estates,
Taxes & Small
Business

Certified Senior Advisor (CSA)[®] ♦ Elder Care Professional ♦ Accredited Estate Planner (AEP)

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How to Set Up a Living Trust in California

Living trusts, or revocable trusts, are a great option for folks who want to distribute inheritance to their children or loved ones after they pass. Unlike an irrevocable trust, a living trust is one that can be changed during a person's lifetime. Learn what a living trust is and the importance of creating one, and view our guide to setting up a living trust in California below.

The Basics of a Living Trust

A living trust is a legal document that is created to manage the assets of the trustor (the creator of the trust) while they are still alive. An individual is appointed trustee by the trustor and it is the trustee's responsibility to manage the trust assets. A living trust is considered revocable, meaning it can be altered while the trustor is still living. Once the trustor passes, it is then irrevocable, meaning it can no longer be changed.

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Fall Activities to Get you Moving and Out of the House

Social connections help us stay mentally healthy. Think of "people time" like "gas" in the car of your mental health that keeps it going, especially if you're an extrovert. Although the hot days of summer may be coming to a close, you shouldn't hunker down inside quite yet! With winter coming on, it's a great idea to make good use of the fall weather while it is here. Here are some low-cost, outdoor fall activities for seniors that our Behavioral Health Specialists put together to help you spend more time with the people who mean the most to you.

1. Outdoor Art

Try buying a cheap set of paints and a canvas, and express your artistic side. Sit next to some friends or family while you work on an art project. Make sure to talk, laugh and joke!

2. "Sit and Stitch" Knitting or Crochet Circle

You may already have the materials to do this. For this low-cost fun fall activity, invite some people to your favorite outdoor place, bring fold-up chairs or utilize park benches. Talk while you knit, purl and crochet your way to a new warm fall scarf.

3. Gardening or Planter Decorating

Play in the dirt while you garden. Studies show that gardening can reduce stress while providing beneficial sunshine and physical activity. Consider planting low-cost spring bulbs like tulips, daffodils and grape hyacinths. Fall is the perfect time to plant them. Enlist friends and grandkids.

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What Our Clients Say About Us

"Marcia has been someone I could count on to always perform impeccably and has been a tremendous asset to her clientele. She is a compassionate, highly detailed professional, who truly cares about senior clients."

—RM

How to Set Up a Living Trust in California
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The Importance of Living Trusts in California

A living trust can be beneficial during the estate planning process. While it may take time and careful planning to set up, it may be best to create a living trust so that you can alter it as needed while going on through life. A benefit of having a living trust in California is that you typically do not have to go through probate. Not only does it save time and energy, but it also means beneficiaries listed may receive their inheritance sooner. Last but not least, a living trust can provide relief after the trustor passes away because property and assets are handled ahead of time.

The Unofficial Checklist to Setting Up a Living Trust

1. **Make note of your assets** (tangible and financial property such as real estate, bank accounts, art, jewelry, cryptocurrency, etc.)*
2. **Appoint a trustee**
3. **Choose your beneficiaries**
4. **Create a Declaration of Trust** (with an estate attorney)
5. **Sign your trust document** in the presence of a notary public
6. **Transfer your property** to the trust

*Items that depreciate over time, such as vehicles and boats, should be excluded.

Source: www.mcampbellcpa.com

Please contact our office for more information.†

“You are never too old to set another goal or to dream a new dream.”

~ C.S. Lewis

First Day of Autumn

9/22/2022



Fall Activities to get you Moving and Out of the House
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4. Pumpkin Patches and Pumpkin Carving

Several pumpkin patches are open to the public where you can find your new favorite Jack O’Lantern or fall decoration. It could be helpful to call before you go to find out how busy it may be. Carve outdoors if you have a patio. Be sure to take a trash bucket or a plastic bag to catch those scraps!

5. Apple Orchard

Going to an apple orchard hearkens back to an earlier time, and will give you a dose of fall spirit. Most apple orchards charge less than \$5 for admission, and the apples are cheap and plentiful. Call to find out what apple varieties are available and any other activities the orchard may have. Many apple orchards also offer warm cider and fresh cider doughnuts, so you can make a day of it!

6. Fishing

Always check local information about permits and when fish are active. Whether or not they are biting, fishing is a great way to spend time outdoors near beautiful bodies of water with family and friends alike.

7. Feed Ducks and Geese

Bring grapes and lettuce (bread is not good for waterfowl like ducks and geese) and help the geese and ducks fuel up for their great migrations. Whether it’s sitting outside, seeing cute animals, or just being with friends or family, feeding ducks and geese is the full package!

8. Go Leaf Collecting

As the leaves cascade from the trees in the coming weeks, consider taking a walk around and picking up beautiful leaves you find with friends and family. At the end, delight your loved ones by offering to trade leaves with them. If you have some crayons and paper, you can memorialize your day with leaf rubbings without spending a cent.

Source: <https://ioraprimarycare.com/blog/outdoor-fall-activities-seniors/>

Please contact our office for more information.†



You can e-mail us at Lilly@MCampbellCPA.com to receive your newsletter by e-mail!