WILLS & TRUST ATTORNEYS



ESTATE PLANNING, SIMPLIFIED.

Secure your future today
for peace of mind tomorrow.

ESTATE PLANNING

Everything You Need to Know

WHAT IS ESTATE PLANNING?

Estate Planning is about planning ahead and choosing who will be in charge of you, your family and your assets if you no longer can.

WHO BENEFITS FROM ESTATE PLAN?

An Estate Plan helps your loved ones left behind save time and money upon your passing. A well-thought-out Estate Plan helps maintain control over who receives your assets when you pass on or become incapacitated, helps reduce or eliminate estate taxes, helps avoid the tedious and costly probate process, and conservatorship.

WHO NEEDS AN ESTATE PLAN?

Everyone should have an Estate Plan. If you own anything of value, you will need a plan for how to pass it on. Estate Planning can make life a lot easier for your loved ones who won't want to be thinking about financial and legal matters after you become incapacitated or pass on.

We support you to achieve an "Effective" Estate Plan with:

- **A responsive team**
- **No additional fees for questions**
- **Follow-up and follow through**
- **Education and advice**

"EFFECTIVE" ESTATE PLANNING

"I founded this firm in 2008 with the goal of not only creating estate plans for our clients, but doing everything we can to ensure our clients have an 'Effective' estate plan for the rest of their lives.

I have structured the firm so that not only can we 'say' we can help our clients in the future, but we also have the firm infrastructure in place to support them as things change in their lives."

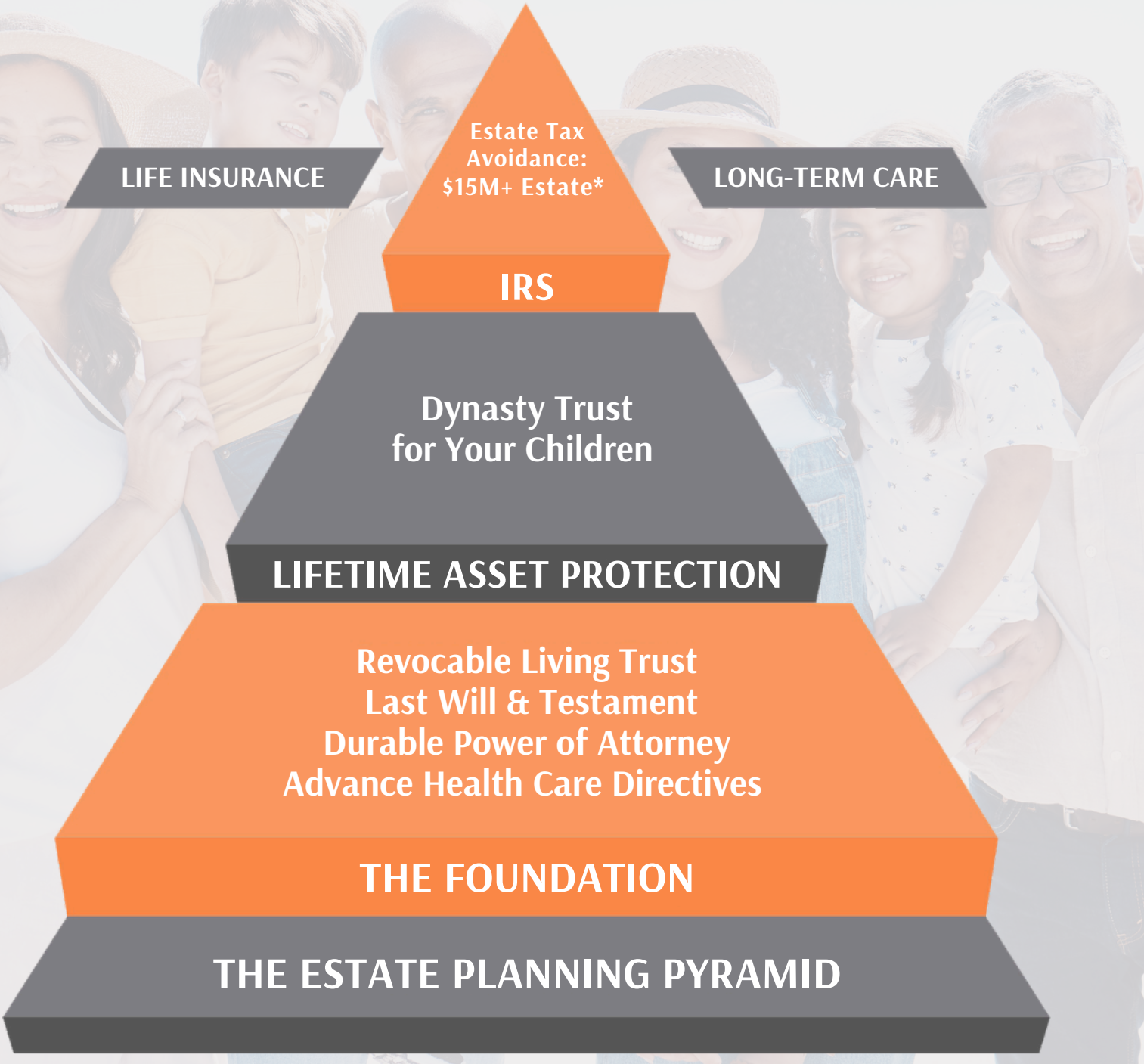


BRIAN CHEW
Founder & Principal
OC Wills & Trust Attorneys

Prepare for your loved ones and protect your assets.

FREE CONSULTATION

PROTECT YOUR FAMILY'S FUTURE WITH AN "EFFECTIVE" ESTATE PLAN



*As of January 1, 2026, the federal gift and estate tax exemption amount is $15M per individual.

DID YOU KNOW?

For Estates worth over $15M, the top estate tax rate is 40%.*

4 CORE ESTATE PLAN DOCUMENTS

Protect yourself, your family and your assets if you pass on or become incapacitated.

REVOCABLE LIVING TRUST

- Helps avoid the high costs and delays of probate
- Appoints a successor trustee who will be in charge of your estate
- Allows you to control how and when your heirs will receive your assets
- Can provide lifetime asset protection for your heirs
- Can protect your heirs against creditors, substance abuse issues and staying qualified for government benefits

LAST WILL & TESTAMENT

- Nominates a back-up guardian for your minor children
- Ensures overlooked assets will be distributed through your Trust

DURABLE POWER OF ATTORNEY

- Appoints an agent who can make decisions on your behalf for financial and legal matters if you are incapacitated
- Avoids need for a court appointed conservatorship of your estate
- A comprehensive power of attorney will allow your agents to reallocate your assets in order to facilitate long term care planning

ADVANCE HEALTH CARE DIRECTIVES

- Appoints agent who will make healthcare decisions for you if you are incapacitated
- Avoids need for a court appointed conservatorship of your person
- Includes your Living Will which dictates the decisions your agent should make, if you are unconscious, on life support, and your doctor has indicated that there is nothing else they can do for you

3 EASY STEPS TO ESTATE PLANNING

1. **SCHEDULE A FREE CONSULTATION**
   With Our Estate Planning Attorneys
2. **DRAFT & REVIEW YOUR ESTATE PLAN**
   Customized to Fit Your Needs
3. **SIGN & REGULARLY REVIEW**
   We Help Keep Your Estate Plan Updated



LIFETIME TRUSTS
For Your Beneficiaries

OC WILLS & TRUST ATTORNEYS

DYNASTY TRUST

Provides lifetime asset protection to your children for your estate.

- A Personal Asset or Dynasty Trust is a provision in your Revocable Living Trust
- Your children's inheritance is protected from creditors, judgments, divorces
- Your children as Trustee can have complete control over their share of the assets or;
- You can use a third party Trustee to manage assets until your children reach a certain age or for their lifetime
- You can make it more likely that your estate will pass on to your grandchildren rather than your children's spouses

SPECIAL NEEDS TRUST

Protect your beneficiary's Medi-Cal or SSI Benefit with a Special Needs Trust.

- Outright distributions or beneficiary designations to heirs who receive needs-based government benefits can jeopardize those benefits
- 3rd Person Special Needs Trusts are not subject to the Medi-Cal liens
- A beneficiary who receives an injury settlement or inheritance can now arrange for a 1st Person Special Needs Trust without court approval



If your existing Living Trust provides for an outright distribution to your children, their inheritance can be attacked by creditors, spouses and judgments.

Proper Special Needs planning is critical for keeping your beneficiaries eligible for their needed government benefits.

AVOID COSTLY PROBATE

Spare Your Loved Ones the Stress

Probate court proceedings (during which a deceased person's assets are transferred to the people who inherit them) can be time-consuming, stressful, and costly. This highlights the value of having an estate plan to avoid probate for any asset you own—real estate, bank accounts, vehicles, and so on—and to spare your loved ones the hassle.

Probate fees are set by California probate code § 10810, which caps the maximum fees that attorneys and executors can charge for a probate. There are additional costs for filing and appraisals fees.

AVOID PROBATE FEES WITH ESTATE PLANNING

- ✓ Save Time
- ✓ Save Money
- ✓ Save From Stress



*PROBATE FEES CHART

(GROSS ESTATE)

Estate Value	Fees to Attorneys
$100,000	$4,000
$200,000	$7,000
$300,000	$9,000
$400,000	$11,000
$500,000	$13,000
$600,000	$15,000
$700,000	$17,000
$800,000	$19,000
$900,000	$21,000
$1,000,000	$23,000
$2,000,000	$33,000
$3,000,000	$43,000

*This probate fee chart is for informational purposes only.

Our Attorneys can tailor your estate plan for your needs today, and make it flexible to grow with your family as things change.

WE CAN HELP

WHY TRUST US?

Expertise & Experience

OC WILLS & TRUST ATTORNEYS

Dr. Robert

"OC Wills made the daunting process of setting up a trust incredibly straightforward. Their compassionate and knowledgeable team guided me through every step, patiently answering all my questions. I felt confident knowing they had my best interests in mind. Their comprehensive approach to estate planning gave me peace of mind. I highly recommend OC Wills to anyone seeking trustworthy and professional assistance with their will, trust, or estate administration needs."

Zhiming

"After shopping around, we ended up working with OC Wills and Trust Attorneys. Ellie was very enthusiastic and professional and explained everything in Chinese in a very clear and understandable way. We are very satisfied."

Bonnie

"We just had our trust updated with OC Wills and Trust, and it was a great experience throughout. What sets them apart for me is that they have created an efficient, organized system which makes the complex process much simpler and easier to deal with than it might be otherwise.
I really appreciate how they function as a kind of support system for the trust with periodic webinars that trustees can attend to learn how fulfill their responsibilities, and thoughtful tools such as a comprehensive binder containing not only the trust documents but a variety of materials to help you manage the trust going forward. Can't say enough good things about process. Highly recommend."

Patrick

"Mr. Chew and his team provided exceptional service, support and guidance throughout the entire process. I entered the initial client discussion with what I thought was decent knowledge of the Will and Trust processes. I quickly learned that there were so many considerations of which I was not aware, and Mr. Chew patiently guided me through those and helped me understand the potential impacts of any decisions that needed to be made. I would recommend OC Wills and Trusts very highly, truly wonderful experience."

Gregg

"I had the pleasure of meeting with Brian Chew, and I understand why his firm is so highly rated. What sets them apart is their team's working environment, with multiple offices and attorneys. They have attorneys for new clients and attorneys for existing clients, and questions are no charge for clients. OC Wills & Trust Attorneys operates like an efficient law firm that will be there when my family needs them most. They even offer a free first consultation!"

Donna

"I had an excellent experience working with Eric Lund of Orange County Wills & Trust Attorneys. He was knowledgeable and thorough, explaining every step in clear, understandable terms. Daniela, the coordinator, showed patience, professionalism and responsiveness, throughout the process, making it quick and easy. They listened carefully to my concerns, anticipated issues I had not considered, and created a plan tailored to my needs. I highly recommend them."

Tina

"Great experience with Brian and the team! I first attended their estate planning seminar which answered most of my questions, so the actual trust/estate planning process went super smoothly."

Jim

"Have been a client for over 10 years. Very happy with the professionalism and quality of their work. Would gladly recommend them to anyone."





We speak Mandarin & Spanish!

WILLS & TRUST ATTORNEYS



A COMPLETE TEAM OF ATTORNEYS & STAFF

Comprehensive Support for Your Estate Planning Needs

At OC Wills & Trust Attorneys, our dedicated, experienced attorneys and skilled service staff—including Intake, Client Assistance, and Trust Administration—are ready to assist you with all your personalized estate planning requirements, regardless of where you are in the process.

As one of the largest estate planning law firms in Orange County, we are proud to have a diverse team of attorneys across multiple locations, supported by two specialized teams: one for new clients and another for our existing clientele. This structure enables us to respond swiftly and provide exceptional customer service to *all* our clients. Our firm stands out for its commitment to maintaining contact with clients, even years after they've placed their trust in us.

OUR SERVICES

- ESTATE PLANNING
- ESTATE TAX PLANNING
- SPECIAL NEEDS PLANNING
- LIFETIME ASSET PROTECTION
- MEDI-CAL LIEN AVOIDANCE

CONTACT US

- **Irvine:** (949) 755-8334
- **Huntington Beach:** (714) 886-3391
- **Anaheim Hills:** (949) 776-5895
- assistance@ocwillsandtrusts.com
- www.ocwillsandtrusts.com

OUR LOCATIONS

- IRVINE
- HUNTINGTON BEACH
- ANAHEIM HILLS

FOLLOW US