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A Note From Our Firm

Dear Valued Clients,

After a tumultuous 2020, the political and economic changes that are going on around us require constant vigilance. Not only are we still living through a pandemic, but we also got to witness quite an election at the end of last year that resulted in new laws in both California and the country as a whole. As your family's law firm, we commit to being on the cutting edge of keeping you aware of changes that might affect you. Now that a vaccine is available for Covid-19, we hope to see you again at our in-person events soon, in the meantime, we are excited to announce our 2021 **virtual** Family Protection Seminar. Lastly, we want you to know how much we appreciate being your first resource for all your family's professional and legal needs.

Warmest Regards,
Your Copenbarger Law Family

2021 Family Protection Seminar

(A Must Read)



2021 Family Protection Seminar

We are excited to announce a virtual version of our Family Protection Seminar!

While social gatherings are still not yet an option, we wanted to create a means of coming together with our clients to deliver the information you deserve. During this virtual event, you will learn about updates to existing and new laws, how to safeguard your assets, how to make wise legal decisions, and much more! The best part is, you can attend this live virtual event **from the comfort and safety of your home**. Our hope is that you will feel like you are right with us in the conference room for this one-of-a-kind event!



How To Use: Hold your mobile device's camera over the QR code - then tap on the link!

- **When: Saturday, March 27, 2021!**
- **Time: 10:00 AM - 12:30 PM**
- **Registration is now open! Reserve your spot today!**
- **Breakout sessions include:**
 - o Proposition 19: The Past, Present, and Future of This New Law
 - o Essentials of Estate Planning: How to Avoid the Hassle of Probate
 - o Advanced Planning: Taking the Next Step to Protect Yourself During Your Lifetime
 - o How to Take Care of a Loved One with Diminishing Capacity

To register for this event, follow the QR code, visit our website, or call our office at 800-244-8814 for additional assistance.

Proposition 19: What You Need to Know Now

Moving an assessed value to a new home? For those over 55 or severely disabled, there are advantages for you with this new law!

Prior law allowed eligible homeowners, including those age 55 or older or who are severely disabled, to transfer their primary residence property tax value to within a county or to 9 other participating counties, **one time** during their lifetime if the replacement primary residence value was of equal or lesser value. But that has changed!



Proposition 19 expanded this rule by allowing homeowners to transfer the taxable value of their primary residence to a replacement primary residence.



**Move from Your
Family Home**



To Your Better Home



**And Keep Your Lower
Property Tax Base**

While legislation is still being finalized for this new law, we are working hard to provide you with as many options as possible to protect your property from reassessment as soon as we possibly can. We have an internal research team of attorneys who are consulting with other law firms, organizations, and experts who have worked tirelessly for months to provide these viable options for you which we will share in the breakout session of the Family Protection Seminar.

For more information on Prop 19, as well as updates on what options we have available for you at this time, register now for the Family Protection Seminar. If you are unable to attend this event but need assistance, please call our office at 800-244-8814.

Doing Our Part

Become Copenbarger Approved to Save Small Businesses

At Copenbarger Law Firm, we take pride in helping other businesses in our community. Learn how to become Copenbarger Approved! Email info@copenbarger.com with your name, email, and phone number along with a brief overview of your business. Become a valuable resource for your legal community today!



A Note to Churches

Hello fellow Brothers and Sisters in Christ,

Wow, what crazy times we live in! Despite the last year and the foreseeable future, we know one thing for sure—**God is still on the throne!** We have all been affected by COVID-19. Many of us have been affected financially and some of us have even lost loved ones. **We are all in this together!** At Copenbarger Law Firm, we want you to know we are with you, and we are here for you.

Due to the happenings of the pandemic, political changes, and the recent modifications in law, our services are needed for Californians more than ever. **We are here for you and your congregation**—protecting your loved ones and legacies.

Remember, even though it seems like all the world is chaotic, the Bible reminds us, “God reigns over the nations; God is seated on his holy throne” (Psalm 47:8, NIV)."

Thank You – 15 Best Probate Attorneys in Tustin, CA

This year, Copenbarger & Copenbarger LLP placed in the top 15 Probate Attorneys in Tustin, CA. This scoring was based on availability, qualifications, reputation, experience, and professionalism. We are so honored to be recognized as a firm that displays all of these attributes and hope to continue serving our clients with the same level of care for many years to come.





Greg Ring from – The Giving Crowd

Do you have a real estate investment property? If you are considering selling property to alleviate the stresses of maintaining and managing and want to live a more simplified retirement, make sure you keep the following in mind.

While the above option seems logical, keep in mind that selling your property will cause a great long-term capital gains tax liability. Not only are these taxes huge, but they will also be spent on the federal government's terms, which may not align with what you want. You may be wondering, **"Is there another way?"**

What if you could reduce, defer, or even eliminate those taxes on the sale of a property?



Would you like to:

- Sell your property and harvest the high appreciation?
- Remove the management burdens so that you can spend more time with your loved ones?
- Reduce the long-term capital gains tax?
- Enhance your retirement income?
- Still have the means to give to the charities you are passionate about?

We can help you! We have three great options that can help you accomplish all of these things. By establishing one of these options, you'll have the opportunity to:

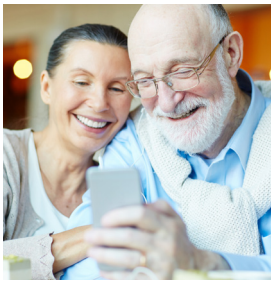
- Save hundreds of thousands of dollars in capital gains tax
- Increase retirement income by tens of thousands of dollars
- Maintain a substantial inheritance for your loved ones
- Leave a substantial gift to the charities you care about



****If you want more elaborated information about the different options that can save you money when selling a real estate property, visit our website at www.Copenbarger.com or scan the QR code.****

• • • How to Stay Connected, Healthy, & Happy During Quarantine • • •

This past year has certainly tested us! We have had to adapt to a new normal as our regular means of life and relaxation due to the pandemic. We are all struggling with the lack of human connection that we were accustomed to. While these limitations are definitely a cause for stress and frustration, there are still ways to remain connected, healthy, and happy during this time of quarantine.



Stay Connected!

We have gained a new-found realization of how much we genuinely rely on human connection. While we are not able to connect with our family, friends, and loved ones in the same capacity as before, it is still important to connect in the ways that we can! Zoom and FaceTime calls have been a great way for loved ones to connect from the safety of their own homes. You might also want to send a letter in the mail. With all the technology that is available these days, there is something so fun and exciting about getting “snail mail”!



Stay Healthy!

It is crucial that you take care of your health! Try to set yourself up for success by getting about seven or more hours of sleep each night. Do your best to nourish your body with healthy foods, and try to keep your body moving as much as you can! Exercise has obvious physical health benefits and will also help to manage your levels of stress. Take a walk in your neighborhood or go on a local hike to move your legs and get some fresh air!



Stay Happy!

It is important during this time to find new ways to enjoy yourself. Perhaps you can take up a new hobby, like baking or gardening! You may find it helpful to plan something to look forward to, whether that be making your favorite recipe for dinner next week, or planning that big vacation for next year. Remember to practice gratitude during this time to remind yourself that, even in the most difficult times, there are still so many reasons to be thankful!

A Note to Our Access Members Covid- Vaccine

We at **Copenbarger Law Firm** want to offer new protection for you and your spouse. Covid-19 has taken so many lives and now that there is a vaccine available, we want to help you get it. We recognize getting a vaccination appointment can be confusing. If you are unsure if you are eligible for the vaccine, we have provided a QR code to the CDC website that provides detailed information about the vaccine. If you need assistance in any way regarding Covid-19 vaccine information, eligibility, or booking an appointment to get your vaccine, give us a call at **800-244-8814**, and we will help you get the information you need.





Clarissa Marshall | Accounting Assistant

Clarissa began working with Copenbarger & Copenbarger LLP in 2005 and has worked in a variety of positions since 2018. She works out of the South Coast Metro office as the Accounting Assistant. She is responsible for ensuring that the department runs smoothly and that everyone across the firm has everything they need to succeed. Clarissa grew up in Anaheim, CA, and has always remained a Southern California local. In her spare time, she enjoys being creative and fills her time sewing, gardening, crafting, and watching movies.

She also enjoys spending time with her family, outside of work and even during the workday. Her daughter, Amanda, is actually a fellow member of the Copenbarger Accounting department. In the future, Clarissa hopes to travel around the world to different places that she has never visited before.



Amanda Geiger | Billing Coordinator

Amanda Geiger has been working in our South Coast Metro office for almost two years now. As the Billing Coordinator, she is responsible for preparing bills and invoices for our different departments and ensuring that our billing records are accurate and up-to-date. Amanda graduated from Cal State Fullerton in 2018 with a Bachelor's degree in Sociology. Her hobbies include spending time outdoors with her husband, Erick, and her mini Australian Shepherds, Indigo and Echo, whether that's gardening, camping, hiking,

or playing frisbee at the beach! Amanda also loves to cook and bake, and is kind enough to bring in homemade treats to the office! This past year, she and Erick purchased their first house! In the new year, they look forward to achieving many home improvement goals to turn their new house into a home. They also have set goals this year to get their family's estate planning affairs in order and to get started with investments for their future.



*Working
With Family*
At Copenbarger, Family
Means Everything.



What do you like about working together at Copenbarger Law Firm?

Clarissa: "Amanda has a great sense of humor and always puts a smile on my face. She's easy to work with. I'm so thankful she's part of the Copenbarger Team. I can't think of a better way to have more family time together than this."

Amanda: "It's good to know I always have someone by my side at work. My mom has worked with the law firm for most of my life, so I feel I've always been a part of the Copenbarger Law family!"



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Find us online! Reviews are always appreciated!



Spring Newsletter 2021



How To Use:

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Copenbarger & Copenbarger LLP
attorneys at law

**REGISTER
NOW**

— FOR OUR —

**2021 FAMILY
PROTECTION
SEMINAR !**