

MAY 2025

Piece Of Mind

*In order for you to have peace of mind,
we are giving you our piece of mind.*

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A NEIGHBOR'S PROMISE A LESSON IN PLANNING FOR OUR LOVED ONES — PETS INCLUDED

When my family and I settled into our new neighborhood a few years back, we were fortunate to connect with several fantastic neighbors quickly. One of them, Greg, lived alone with his cherished dogs — his best friends and constant companions. Though I didn't know Greg well, I knew how much those dogs meant to him. His next-door neighbor, Jeff, and his family had been close to Greg for years, and their friendship was built on mutual respect and care.

When Greg was diagnosed with cancer, Jeff stepped in to help. Knowing that Greg didn't have family nearby, he offered to check on and care for the dogs daily. Though my family and I offered to pitch in, Jeff assured us he wanted to do this for his friend. It was a small act of kindness that made a world of difference for Greg, giving him peace of mind during a difficult time.

As Greg's condition worsened, he thought about his dogs and what would happen to them if he died. The thought of them ending up in an overcrowded shelter weighed heavily on him. So, he turned to the one person he trusted most: Jeff. Greg asked Jeff to take in the dogs if he passed, and Jeff, without hesitation, agreed.

When the time came and Greg passed away, the police arrived to follow standard procedure, which meant taking the dogs to a county shelter. Jeff stepped in immediately, explaining the promise he had made to Greg. I am unsure if Greg had an estate plan, but it was nowhere in sight if he did. Before turning the dogs over to Jeff, the police had to contact Greg's next of kin — an estranged wife living out of

state. Fortunately, Jeff had her phone number, Greg had communicated his wishes to her, and she approved the transfer of the dogs to Jeff. The dogs are now safe with Jeff and, thankfully, didn't have to endure the trauma of a trip to a shelter with people they don't know.

This experience was a powerful reminder of the importance of planning — not just in writing but also in communication. Estate planning isn't just about finances; it's about ensuring the people — and pets — we love are cared for according to our wishes.

This applies not only to pets but to end-of-life decisions, guardianship of minor children, and any other important matters for which time may be a critical factor. In Greg's case, it was important Jeff was able to quickly step in before the dogs were taken. A written estate plan is essential, but ensuring key decision-makers are informed and connected is just as crucial. Had Greg's wife and neighbor not known about his wishes, the outcome could have been much different for his beloved dogs.

Let Greg's story serve as a reminder: Communication is key. For all time-sensitive aspects of your estate planning, such as guardianship of children and custody of pets, make sure the people who will be responsible for carrying out your wishes know what those wishes are and how to reach each other when the time comes.

A conversation today can make all the difference tomorrow.

-Jennifer Knight



Protecting Your Property

SAN DIEGO'S NEW OWNER ALERT SYSTEM

Real estate fraud is on the rise. The Life Plan™ has provisions that help protect against such fraud, such as the Silent Partner Trustee Provision, but for many of our clients, there is more you can do to protect yourself.

As part of its ongoing efforts to protect property owners from real estate fraud, the San Diego County Assessor/Recorder/Clerk's Office has introduced a new and innovative tool: **Owner Alert**. This free service is designed to provide peace of mind for homeowners and property investors by offering real-time notifications of any changes to the title of your property.

What is Owner Alert?

Owner Alert is a cutting-edge real estate fraud notification service that sends subscribers an immediate email alert whenever a document is recorded in the San Diego County Official Records that transfers title to your property. Owner Alert helps ensure you are notified quickly if someone attempts to alter the ownership of your property without your consent.

The service is free, and enrolling takes less than five minutes. You only need an email address and your Assessor Parcel Number (APN) to get started.

How does it work?

Once enrolled in Owner Alert, you begin receiving automated notifications whenever a document that involves the name or APN you've registered is recorded. The service provides alerts for up to 10 names and/or 10 APNs per email address, ensuring you can easily monitor multiple properties.

Why should you care?

Real estate fraud is a serious concern, especially in today's digital world. Fraudsters may attempt to forge signatures or manipulate documents to illegally transfer property ownership. Often, the first sign that something is wrong comes when the rightful owner is contacted about a loan, sale, or other action on the property they didn't initiate.

Owner Alert helps you stay one step ahead of potential fraudsters by notifying you of any document recorded in the San Diego County

Official Records related to your property. Whether the change is legitimate or fraudulent, you'll know about it immediately so you can take swift action to protect your property.

Key Benefits of Owner Alert

- **Immediate Notifications:** Get an email alert whenever a document is recorded that affects your property title.
- **24/7 Monitoring:** The service provides round-the-clock monitoring of your property's title.
- **Free:** Owner Alert is available at no cost, and you can unsubscribe at any time.
- **Multiple Registrations:** You can register up to 10 properties and/or names per email address, giving you comprehensive monitoring capabilities.

How to Enroll

Enrolling in Owner Alert is simple and free. Here's how you can sign up:

1. Visit the San Diego County ARC website: [SDARCC.gov/OwnerAlert](https://sdarcc.gov/OwnerAlert)
2. Enter your name, email address, and the Assessor Parcel Number (APN) for the property you wish to monitor.
3. Complete the registration, and you'll start receiving alerts!

Other counties in California offer similar services.

San Diego is not the only county offering this service. Many counties across California now offer real estate fraud alert systems to help protect property owners. If you own property outside San Diego, check with your local County Recorder's Office — either online or by phone — to see if a similar free service is available. While each county may have slightly different enrollment processes or features, the common goal is to safeguard your property from fraudulent activity.

With real estate fraud on the rise, taking proactive steps is essential. San Diego's *Owner Alert* program adds a valuable layer of protection with minimal effort. Signing up is quick and free, giving you peace of mind by alerting you if any changes are made to your property's title. If you own property in San Diego, or another county with a similar program, we strongly encourage you to enroll to ensure your ownership remains secure and to respond swiftly to any suspicious activity.

Step by Step

HELP YOUR KIDS FALL IN LOVE WITH HIKING

Getting your kids outdoors to enjoy nature is a goal worth pursuing, but smartphones, video games, and social media have made it far more challenging in recent years.

We celebrated Earth Day on April 22, and a nature walk is a great way to keep the appreciation for nature going. Planning games, creative projects, and other challenges to engage them during your hike can get kids involved from the start.



Choose a trail that isn't too difficult, and allow your children to wander and explore. If your children have a creative flair, encourage them to collect dried leaves, pieces of bark, seed pods, sticks, and other items to use in a collage.

For adventurous kids, you can draft an age-appropriate list for a scavenger hunt to keep them from growing bored on the walk. You can include different insects native to your area, specific colors of leaves, and types of flowers, and you can even have them keep an ear out for different bird calls.

Challenge your kids to make a list of all the plants or animals they can identify while they walk. Apps like Leafsnap help you identify plants using photos of their leaves or other parts. Additionally, the Arbor Day Foundation offers an online step-by-step guide at ArborDay.org for identifying a tree by its leaves.

Keep the learning going by having your kids record their distance based on trail signs or a map app on their phones and calculate their average speed. You could also invite your youngsters to become cartographers, tracing the trail and surroundings on paper, including landmarks, rivers, and lakes. Older kids can add topographical information using their phones or an altitude app such as Altimeter or My Altitude.

Hiking is a fantastic activity to help your kids appreciate the outdoors rather than their phone screens, but being in nature takes energy. Remember to pack snacks and a water bottle before you leave, or pack a favorite picnic meal to savor the rewards of exploring the outdoors!

Sudoku

	4	1		9		8		
8				6	7		3	
					4			
1		8						
9			7		3			1
						3		5
			4					
	2		8	3				7
		6		2		5	4	

Solution on Pg. 4

Slow Cooker Shredded Beef Lettuce Cups

Inspired by TasteOfHome.com

Ingredients

- 1 boneless beef chuck roast (about 2 lbs)
- 3 medium carrots, peeled, chopped
- 2 medium sweet red peppers, chopped
- 1 medium onion, chopped
- 1 8-oz can unsweetened crushed pineapple, undrained
- 1/2 cup reduced-sodium soy sauce
- 2 tbsp packed brown sugar
- 2 tbsp white vinegar
- 1 garlic clove, minced
- 1/2 tsp pepper
- 3 tbsp cornstarch
- 3 tbsp water
- 24 lettuce leaves for serving

Directions

1. In a 4- or 5-quart slow cooker, combine roast, carrots, peppers, and onion.
2. In a small bowl, stir together the next 6 ingredients; pour over roast.
3. Cover and cook on low for 6–8 hours. Remove roast, let cool slightly, then shred.
4. Skim fat from cooking juices, then transfer juices and vegetables to a small saucepan; bring to a boil over high heat.
5. In a small bowl, combine cornstarch and water, stir mixture into juices, and cook 3–4 minutes until sauce is thickened.
6. Return beef, sauce, and vegetables to slow cooker; cook for 10–15 minutes.
7. Serve beef in lettuce leaves.

3	4	1	5	9	2	8	7	6
8	5	2	1	6	7	4	3	9
6	9	7	3	8	4	1	5	2
1	3	8	2	5	9	7	6	4
9	6	5	7	4	3	2	8	1
2	7	4	6	1	8	3	9	5
5	1	3	4	7	6	9	2	8
4	2	9	8	3	5	6	1	7
7	8	6	9	2	1	5	4	3

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The information provided in this newsletter does not, and is not intended to, constitute legal advice; instead, all content contained herein is for general informational purposes only.

Big Dreams, Small Budget *Destination Dupes That Deliver*

Have you been planning, saving, and dreaming about the perfect getaway only to realize your bucket list destination comes with a bucketload of expenses? Don't put away that passport yet! Some of the most talked about travel locales today are destination dupes — places offering all the charm, culture, and excitement of big-name hot spots without the sky-high price tag. Let's get packing with these wallet-friendly wonders that let you travel big!

Liverpool for London

London is one of the most popular cities for tourists, and it doesn't come cheap. But, if you have your heart set on experiencing British history, a tasty pint, and great places to explore on foot, Liverpool is quickly becoming a beloved alternative to the country's capital. Highly walkable, minus the chaos of London's hustle and bustle, Liverpool offers so much to see and a truly British experience. Not only does it have entertainment and charm, it's the birthplace of The Beatles. Though you will miss out on Buckingham Palace, you can experience rock royalty at the famous Cavern Club, where some of Britain's greatest rock bands performed.

Kraków for Rome

Though Poland may seem worlds apart from Italy, Kraków has the same fairytale charm and old-school style as Rome. Unlike Rome, Kraków has

more breathing room and a far more laid-back atmosphere. If the history of Rome calls to you, you'll find many historical sites in the city to explore, including the Wawel Castle. And foodies can enjoy a wide variety of cuisines, from traditional Polish to Middle Eastern dishes.



Budapest for Barcelona

Barcelona tops many people's list of must-see cities, making the summers incredibly busy and expensive. If you want an architectural treat with a fascinating history akin to Spain's central city, you can head to Hungary. Budapest is the country's largest city and features buildings representing many eras of design, from art nouveau to baroque. You'll also find a history museum for everyone in your family, from the House of Terror to the Museum of Fine Art.