



California Statutory Health Care Directives and Durable Power of Attorney

**Presented by;
Sheila-Marie Finkelstein, Esq.**

**September 27, 2023
@ Lakeview Senior Center In Irvine**

This presentation is not legal advice and does not create an attorney client relationship. The purpose is to provide basic education and information on available resources. Please consult an attorney with regards to your individual estate planning needs.



Sheila-Marie partners with clients to manage life's risks from a personal and legal perspective.

Mission Statement: *Estate Planning: Planning for life...with your love!* To provide estate planning and administration legal services with compassion. To make estate planning and administration accessible to those who serve our country and our community (Veterans, Teachers, Nurses, etc.). To support the community through financial contributions and pro bono legal services.

Purpose: To efficiently help professional individuals, families, and service members plan for their life and navigate the unexpected with empathy. To compassionately provide planning, protections, and peace of mind to the individuals who most need them but who are often unaware of such need or believe they cannot afford these services. To offer community education on the topics of estate planning, probate, estate administration, health care directives, and legal rights.

Clients: Families and individuals seeking guidance through the burdensome and complex probate system. I work directly with individuals and families to understand their goals and wishes and develop strategic solutions to meet their needs. No two estate plans, administrations, or probate proceedings are the same. People need our services because they love someone. We honor that love and treat each client as the important individual that they are, and not just a number on the bottom line.

Business Philosophy: Sheila-Marie focuses on Mischpah (Family), Ahava (Love) and Mitzvot (Good Deeds). It is important to engage in Tzedakah (justice). She engages in tikkun olam by supporting those who support our country and community. Through AHAVA LAW and Veterans Legal Institute Sheila-Marie has **prepared over 160 pro bono complete estate plans, donated over \$35,000, and volunteered over 1500 hours, in our local community.**



Sheila-Marie Finkelstein, Esq. is Certified by the California State Bar Certified Specialist in Estates, Trusts, & Probate Law and leads the estate planning and administration department at Klinedinst Attorneys. Prior to joining Klinedinst she founded AHAVA Law, P.C., a Boutique Estate, Trust, and Probate Law Firm where Estate Planning is *Planning for life...with YOUR love!*

Sheila-Marie is passionate about education and veterans. She practices in estate planning because of her experiences as a Clerk for the U.S. Air Force JAG corps, and as an elementary school science teacher with Teach for America. She firmly believes every Californian over the age of 18 needs a proper plan.

Sheila-Marie passed the California Certified Specialist Bar Exam in Estates, Trusts, and Probate, on her first try while nursing her newborn. She is also a Veterans Affairs Accredited Attorney. She launched the pro bono Estate Clinic at Veteran's Legal Institute. Sheila-Marie has been published multiple times in American Bar Association national magazines, has taught several Continuing Legal Education Courses for the Orange County Bar Association, and frequently speaks at private and public events on the benefits of proper estate planning.



CREDENTIALS

- ♦ California Bar Board Certified Specialist in Estates, Trusts, & Probate Law
- ♦ Veterans Affairs Accredited Attorney
- ♦ Super Lawyers™ Rising Star 2018 - 2023

EDUCATION

- ♦ Chapman University School of Law (LLM Taxation)
- ♦ Washington & Lee University School of Law (Juris Doctorate)
- ♦ University of Copenhagen (International Law)
- ♦ University of Nevada Las Vegas (Masters of Education)
- ♦ American University (Bachelors of Arts)

PUBLICATIONS

- ♦ Powers of Attorney, July 2016 – ABA GP/Solo
- ♦ Estate Planning for Old Age and Incapacity, November 2015 – ABA GP/Solo
- ♦ How to Become VA Accredited, March 2019 – ABA GP/Solo
- ♦ When Less Is More: What You Can Gain from Pro Bono and Low Bono Work - February 2020 - ABA GP/Solo
- ♦ Achieving Justice for our Warriors: Past, Present, and Future, November 2020 - Orange County Lawyer
- ♦ My Loved One Died, Now What? A Checklist for the Personal Representative, August 202 - Orange County Lawyer
- ♦ Estate Planning for Veterans: VLI's Pro Bono Estate Clinic, June 2023 - Orange County Lawyer
- ♦ Please see ahavalaw.com and/or LinkedIn for current publication list.

LEADERSHIP

- ♦ Local Parent Teacher Association President (2023-2024)
- ♦ Veteran's Legal Institute – Vice Chair: Executive Board (2016 – Present)
- ♦ OCBA Veterans & Military Committee – Chair (2019-2022) – Vice Chair (2014 -2018)
- ♦ OC Jewish Bar Association – President (2019-2021) – Executive Board (2011 – Present)
- ♦ OC Women Lawyers Association – Executive Board (2012 – 2020)
- ♦ OCBA Young Lawyers Division (2011-2016) – Education Chair (2014)



"TOP 5" SERVICES & REFERRAL SOURCES

As of April 20, 2023

TOP 5 SERVICES

1. **Estate Planning:** For those who like to be prepared. Unbundled fixed fee estate plan services. Each estate plan is tailored to the needs and desires of the particular client.
2. **Trust Administration:** For those who planned ahead. Affordable administration services provided according to the clients' comfort levels and desires.
3. **Probate:** For those that fail to plan. Help navigate the complex probate system.
4. **Conservatorship:** For those that fail to plan, plan poorly, or need additional protections.
5. **Trust Litigation:** For contested and/or poorly drafted plans.

TOP 5 REFERRAL SOURCES

1. **Attorneys** (Family, Business, Employment, Personal Injury, Intellectual Property, Civil Litigation, etc.)
2. **Financial Professionals** (CPAs, CFPs, Bankers, Financial Advisors, Investment Advisors, Insurance providers, etc.)
3. **Property Professionals** (Real Estate Agents, Escrow Agents, Lenders, etc.)
4. **Social Educators** (Social Workers, Hospitals, Elder Homes, Churches, Schools/Teachers, Veterans Benefit Providers, etc.)
5. **Primary Caregivers** (Housewives, Stay-at-home parents, people taking care of parents/grandparents, Day care providers)

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