

Early in his career as an attorney, Sandeep Shah specialized in several areas of law, including estate planning.

But when he met Shadi Shaffer and her team at the Asset Protection and Elder Law Center in Irvine, Calif., that was it – no more estate planning. He handed over all his trust and estate-planning clients to her.

“Shadi is by far the best estate-planning attorney I have ever met, so I thought, ‘Why compete with the best?’” says Shah, co-founder of Shah Sheth LLP in Costa Mesa, Calif.

He was so impressed with Shaffer that not only did she handle Shah’s *own* estate plan, but also his *entire family*.

Virtually everyone who meets Shaffer is overwhelmingly impressed with her dynamic presence and knowledge of estate-planning



Shadi Shaffer

Trustworthy

Shadi Shaffer of the Asset Protection and Elder Law Center in Irvine is not only one of Southern California’s leading estate-planning and trust attorneys – she also has a dynamic, larger-than-life personality.

law, not to mention her electrifying energy, enthusiasm, charisma and her unyielding commitment to help her clients and their families.”

Her uncompromising quest is for her clients to

evade the nightmare of probate court in California, which ranks as the worst state in the country when it comes to probate because of the absurd costs and agonizingly lengthy

process.

When it comes to discussing estate planning and trusts, Shaffer is like an ESPN football analyst breaking down the Super Bowl. Talk about enthusiasm and passion.

“I love what I do because there is so much value to an estate plan,” she says, sitting in her spacious, well-decorated office. “Every person in California with a home is crazy not to have a revocable trust and estate plan. They just don’t understand the ramifications of not having it.

“If you have to go through probate, everything comes to a halt. Your entire life comes to a total standstill. Frozen,” she adds. No one can do anything with the assets if it has to go to probate. That’s why it’s so imperative -- and cost-effective in the long run -- to create a trust.”

Don’t fool yourself: estate plans are just as important as other kinds of protection, such as insurance, yet all too often it lands on the back burner behind auto, home and life insurance because “in the majority of cases, there isn’t a sense of urgency for an estate plan like there is if you need a divorce attorney or a criminal attorney,” Shaffer points out.

“You don’t get life insurance hoping to die,” she adds. “You have it for the security, protection, and the peace of mind it provides. It alleviates anxiety and stress and provides families the support to carry on. The power of a revocable trust is tremendous.”

After Shaffer graduated from the University of California, Santa Barbara, and completed law school in San Diego, she passed the bar and was a civil defense attorney at an



Orange County law firm. Less than a year into it, she became disenchanted.

“I felt I wasn’t serving the client,” she says. “The firm I worked for put its needs first. They were always about the bottom line and that is not what I’m about.”

Once, after getting a large client dismissed from a big law suit early in her career, Shaffer was bursting with pride as she returned to her office. Waiting for her was the head of the firm. “Don’t ever settle a case like that without conferring with me first,” he told her – loudly.

Shaffer’s bubble of joy burst just like that.

“That’s not what I got into law for,” she says. “I didn’t feel good about what was happening.” Her moral compass was tested. “I had to be true to myself and my clients,” she says.

So she walked away from the firm. Shortly thereafter, she launched her own firm with her best friend of 20 years – Patrick Phancoo – and they soon found their niche and passion in estate-planning.

“I really didn’t like any other area of the law,” Shaffer says. “It’s too litigious and tumultuous. Too many egos.

“Estate planning,” she adds, “is the opposite. It’s all about avoiding a litigious and tumultuous situation. I didn’t like taking a retainer from a client only to tell them, ‘Sorry, the judge did not agree with me and we lost.’ I

didn't feel as if I had any control."

At Asset Protection and Elder Law Center, Shaffer and Phancao have complete control -- and control means "not having to ever worry about your future again," she says.

It means having protection from the court -- and saving thousands of dollars in legal expenses in the long run.

"This is the best position to be in with the law when it comes to trusts. You don't want to wait until the [bleep] hits the fan," Shaffer says with a laugh. "By then, it's too late. It's about being proactive. It's about being prepared, organized and thorough."

Which precisely describes how Shaffer and the Asset Protection team is -- prepared, organized and thorough, not to mention caring and compassionate.

"Shadi and her team are a joy to work with," Shah says. "She's so great because she's so honest and so candid and you know she cares. That's a great combination."

Our politicians should take such an approach.

"She's also tough, yet so compassionate and loving -- another rare combination," he adds.

No one wants to talk about death, taxes, and their very private financial dynamics, yet when you are working with Shaffer, it turns into a comfortable, entertaining, fun and relaxing dialogue.

One client, who waited 20 years to do a trust, told Shaffer that if she knew how comfortable and seamless the process would be, she would have done it 20 years earlier. Then she paused and told Shaffer: "Now I know why I put it off -- because I was meant to be here with you."

Tears welled up in Shaffer's eyes.

"That's the biggest compliment I can receive," she says. "I love the work I do."

Compliments for Shaffer and her team are as common as Tom Brady and Joe Montana engineering Super Bowl-winning TD drives.

Not only do clients rave about Shaffer and the Asset Protection team, but so does the office staff. When an employee suffers a loss or is enduring a personal problem, Shaffer tells them, "You're leaving and we don't want to see you here for a week or two."

The firm has even gone as far as to purchase airline tickets for the employee following the loss of a loved one.

"Why?" Shaffer asks. "*Because that's what you do.* You have to back up what your belief system is, even if it's tough on to the bottom line.

"At our firm," she adds, "we take family commitment to another level. It is this commitment to family and our clients that we provide. From Patrick and me to Lana Del Monaco (Client Services Director) and Ruth Brissenden (Associate Attorney), we love what we do and it shows in the commitment and care we provide to every client that comes through our doors." — ***By Rick Weinberg, Editor***

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