

**Subject:** Fwd: HBM Estate Planning Workbook.pdf, Certificaction of Trust For Hani Sayegh and France Sayegh Revoncable Dated Jan 25 2005 (26) pages.pdf + 1 more item - Invitation to edit  
**From:** Nuha Sayegh <nuha@recovery-compass.org>  
**To:** Eric Jones <eric@recovery-compass.org>,Nuha Sayegh <Chefnuha@gmail.com>  
**Date Sent:** Sunday, November 2, 2025 1:16:49 AM GMT-07:00  
**Date Received:** Sunday, November 2, 2025 1:16:53 AM GMT-07:00

Begin forwarded message:

> From: Theodore Bertier <[t.bertier@hbmlawgroup.com](mailto:t.bertier@hbmlawgroup.com)> > Subject: Fwd: HBM Estate Planning Workbook.pdf, Certificaction of Trust For Hani Sayegh and France Sayegh Revoncable Dated Jan 25 2005 (26) pages.pdf + 1 more item - Invitation to edit > Date: February 5, 2021 at 1:47:01 PM PST > To: [Freddy@thefoxxfirm.com](mailto:Freddy@thefoxxfirm.com), Tate Hilmoë <[t.hilmoë@hbmlawgroup.com](mailto:t.hilmoë@hbmlawgroup.com)>>  
> Mr. Sayegh,  
>  
> I am Tate's law partner and I am responding to you on his behalf because he is dealing with a couple of emergency projects but wanted to get back to you quickly. We have discussed the situation and I've reviewed the information and documents you've provided. We can certainly help your family with this and, per Tate's explicit wishes, we can do this for you at a reduced rate under the circumstances. Here is what we can do for you:>  
> 1. Amend and restate all of Hani and France's estate planning documents, incorporating all desired changes.>  
> 2. Review title reports on all properties to a) ensure they are titled in the name of the trust OR that title is appropriate in order to prepare transfer deeds.>  
> 3. Prepare transfer deeds for all necessary properties, whether into the trust or to a third party (e.g., Samera).>  
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> 5. We can make any changes/additions to the documents, if any, very quickly and send you final documents so the clients can sign/notarize them on their own.>  
> 6. The clients will be responsible for recording all the deeds with the county recorder(s) and will bear those recording costs.>  
> 7. Fees. Per Tate, our reduced fees would be on a flat fee basis and are \$2,500 for the estate planning documents (trust, wills, durable powers of attorney, health care directives) and \$250 per deed we need to prepare. These fees would be due at the time we send the final documents.>  
> Please let me know if you have any questions. If this is acceptable to your parents, we can email them an engagement letter to e-sign and we can begin the work.>  
> Thank you,  
>  
> Ted Bertier  
>  
> HILMOE, BERTIER & MARRERO, LLP  
>  
> Estates, Trusts & Probates | Corporate Law >  
> Del Mar Heights  
>  
> 12526 High Bluff Drive #300, San Diego, CA 92130 >  
> Mission Valley  
>  
> 2650 Camino del Rio North #202, San Diego, CA 92108 >  
> Rancho Cucamonga  
>  
> 10832 Laurel Street #203, Rancho Cucamonga, CA 91730 >  
> t: 800.941.4807 | f: 858.386.4393  
>  
> e: [t.bertier@hbmlawgroup.com](mailto:t.bertier@hbmlawgroup.com)

> hbmlawgroup.com  
>  
> CONFIDENTIALITY NOTICE: This e-mail transmission, and any documents, files or previous e-mail messages attached to it may contain confidential information that is legally privileged. If you are not the intended recipient, or a person responsible for delivering it to the intended recipient, you are hereby notified that any disclosure, copying, distribution or use of any of the information contained in or attached to this transmission is STRICTLY PROHIBITED. If you have received this transmission in error, please immediately notify the sender. Please destroy the original transmission and its attachments without reading or saving in any manner. Thank you.

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> ----- Forwarded message ----- >  
> From: Tate Hilmoe <[t.hilmoe@hbmlawgroup.com](mailto:t.hilmoe@hbmlawgroup.com)> > Date: Wed, Feb 3, 2021 at 2:13 PM  
> Subject: Fwd: HBM Estate Planning Workbook.pdf, Certificaction of Trust For Hani Sayegh and France Sayegh Revoncable Dated Jan 25 2005 (26) pages.pdf + 1 more item - Invitation to edit > To: Ted Bertier <[t.bertier@hbmlawgroup.com](mailto:t.bertier@hbmlawgroup.com)>  
> Ted,  
>  
> Please call me to discuss when you have a minute. I know you're incredibly busy, but if fees come from you it'll be much better. >  
> Best,  
> Tate  
>  
> HILMOE, BERTIER & MARRERO, LLP  
>  
> Business Law | Technology Law  
>  
> California | Maryland  
> p: 800.941.4807 | e: [t.hilmoe@hbmlawgroup.com](mailto:t.hilmoe@hbmlawgroup.com) > linkedin.com/in/tatehilmoe  
> [www.hbmlawgroup.com](http://www.hbmlawgroup.com)  
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> Property Issues 1-5 (Not part to be part of the main estate, notes on each below) >  
> Drive with deeds except for #12  
> <https://drive.google.com/drive/folders/1GF2uGH6xuXK47vGcazgcWsxTeP68rjTp> >  
> The original trust which needs to be updated and amended is attached in this email. >  
> 1. 1576 East Gaywood Drive, Altadena, CA 91001 >  
> This is Hani and Frances's primary residence. It is also the primary resident for daughter Samera Arkel. Pursuant to the wishes of Hani and Frances they want to transfer the property outside of the remaining estate and to transfer and take advantage of Prop 19 Parent/Child Exclusion for the entire 1 Million exclusion. >  
> 2. 1094 Marcheta, Altadena CA 91001

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> This is actually owned by Hannan and Ramzi Sayegh. It was deeded on February 4, 2005 to Hani and Frances Sayegh, to refinance due to poor credit. However, it was purchased initially by Hannan and Ramzi and the mortgage has been paid by them ever since they purchased it. This asset needs to be removed from the general estate. I do not know what Hannan and Ramzi plan on doing with this property. She can be reached at 626-222-5759. >

> 3. 1607 Gaywood Drive, Altadena CA 91001. >

> This home was purchased by Hani and Frances Sayegh, due to poor credit, but was actually owned by Samir and Linda Sayegh as husband and wife, who lived and paid the mortgage. Samir and Linda have since divorced after 38 years. I do not know what their divorce arrangement is. I do not know what they want to do with the property. However, it is not part of the main estate. Please contact Samir Sayegh regarding this property, 310-895-4838 as it's not part of the main estate. >

> 4. 877 and 879 Alameda Street, Altadena, CA 91001 >

> Samir and Linda (Husband and Wife) (1/3) and Fahed (Freddy) Sayegh (1/3) and Nabil Sayegh (1/3) purchased this property together as tenants in common. >

> Without Fahed Sayegh's notice, signature or authorization must have been removed from the title. Only once we pulled all the deeds did we see a record change in 1998 that either through fraud, inadvertence or mistake my name was removed in 1998. Please advise on how to get back on the title without any tax implications. >

> 5. 5895 Washington Boulevard, Culver City CA 90232. >

> In 1994 Samir Sayegh (50%), Fahed Sayegh (25%), and Nabil Sayegh (25%) built this property from the ground up. Due to their young age and lack of credit at the time, the interests of Fahed Sayegh and Nabil Sayegh were held by Hani Sayegh. This asset is not to be considered part of the estate for inheritance purposes by the remaining beneficiaries. Fahed and Nabil are seeking advice on how to resolve this title issue without absorbing a massive tax implication. >

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> THE MAIN ESTATE TO BE INHERITED BY THE FOLLOWING BENEFICIARIES >

> SAMIR SAYEGH (20%)

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> 6. All remaining cash, stock, personal property, remainder assets, and real property. >

> 7. 6710 Van Nuys Boulevard, Van Nuys California > (Held as Hani and Frances Sayegh as Joint Tennants with right of Survivorship) Deed Attached moved to Hani and Frances Family Trust. (Trust Attached) >

> 8. 2095 North Lake Avenue, Altadena CA 91001 > (Held as Hani and Frances Sayegh as Joint Tennants with right of Survivorship) Deed Attached moved to Hani and Frances Family Trust. (Trust Attached) >

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**To:** Eric Jones <eric@recovery-compass.org>,Nuha Sayegh <nuha@recovery-compass.org>  
**Date Sent:** Sunday, November 2, 2025 1:44:40 AM GMT-07:00  
**Date Received:** Sunday, November 2, 2025 1:44:54 AM GMT-07:00

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> Best,  
> Tate  
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> HILMOE, BERTIER & MARRERO, LLP  
>  
> Business Law | Technology Law  
>  
> California | Maryland  
> p: 800.941.4807 | e: [t.hilmoe@hbmlawgroup.com](mailto:t.hilmoe@hbmlawgroup.com) > linkedin.com/in/tatehilmoe  
> [www.hbmlawgroup.com](http://www.hbmlawgroup.com)  
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