

■ CALIFORNIA LEADERS IN LAW

Navigating Families to Peace of Mind



OC ELDER LAW
BY MARTY BURBANK

When you are trying to chart a course for caring for a loved one—whether your aging parents, your spouse or even yourself—who better to steer the process than a 12-year veteran of the United States Navy?

Founding Partner Marty Burbank and his team at OC Elder Law devote their practice to estate planning and elder law. They focus their attention solely on what seniors need to protect themselves and the family they love. Through this commitment, they are able to address their clients' current needs and develop a plan to care for them well into their future, no matter what long-term care challenges they might face.

"We give our clients peace of mind that their loved ones will be protected and they will have funds to cover their care," says Burbank.

OC Elder Law services

- Protect the family home and savings from probate, tax and Medi-Cal
- Qualify for Veterans Benefits and Medi-Cal for home care, assisted living or nursing home
- Wills, trusts, powers of attorney, living wills and advance directives

Managing Partner Joshua D. Ramirez agrees: "OC Elder Law is dedicated to developing a plan for how families are going to take care of themselves now and how they'll handle things if a crisis occurs in the family or if they suffer a disability. They know who will be able to make decisions for them and what will happen, so they don't have to worry."

Burbank and Ramirez both have post-doctorate degrees in tax law, which



Our Fullerton Team

allows the firm to go a step beyond what other law practices do for clients. And the firm works collaboratively with clients' financial advisors, CPAs and bankers to coordinate planning that addresses the whole spectrum of needs.

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— Joshua D. Ramirez, Managing Partner

Complete Care for the 'Greatest Generation'

Caring for "The Greatest Generation" is Burbank's passion. In many cases, OC Elder Law has enabled clients to receive Veterans Benefits to which they didn't know they were entitled. Having been a caregiver for his grandmother and mother in their later years, Burbank has a special appreciation for seniors and their stories.

"We're committed to offering planning from start to finish so clients don't have to leave our office to find complete solutions," Burbank says. "We want to integrate processes for clients and create an overall experience of being

cared for. We're also constantly trying to find ways to reach more people in the community, because there's a real need to serve seniors."

The OC Elder Law team includes two geriatric care managers who oversee a comprehensive plan for each client. The firm works with community professionals who can help navigate the complexities of finding and claiming benefits, such as Medi-Cal and Veterans Benefits, and maximizing resources available within a family.

"We have really cool clients," Burbank says. Some of OC Elder Law's clients include real-life Rosie the Riveters, POWs and people who have worked for U.S. presidents.

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— Marty Burbank, Founding Partner

"You read Tom Brokaw's book," Burbank continues, "and we meet those people every day. It doesn't matter what their net worth is, they all have valuable stories, and we're blessed to be able to offer them peace of mind."

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