



JULY 2022



Feuding Neighbors

Liza Horvath, Senior Advocate

When a neighbor begins to erode the safe feelings we have about our home, we not only feel violated, but we can also feel that our very existence is threatened.

[Learn More](#)

The Obituary Led To My House Being Burglarized

Liza Horvath, Senior Advocate

Honor the loved ones who have passed by printing an obituary and then just be sure to secure the home.

[Learn More](#)

The Trustee Will Not Give Me My Money

Liza Horvath, Senior Advocate

Beneficiaries should never, ever, make financial commitments based on a future inheritance.

[Learn More](#)



Liza Horvath

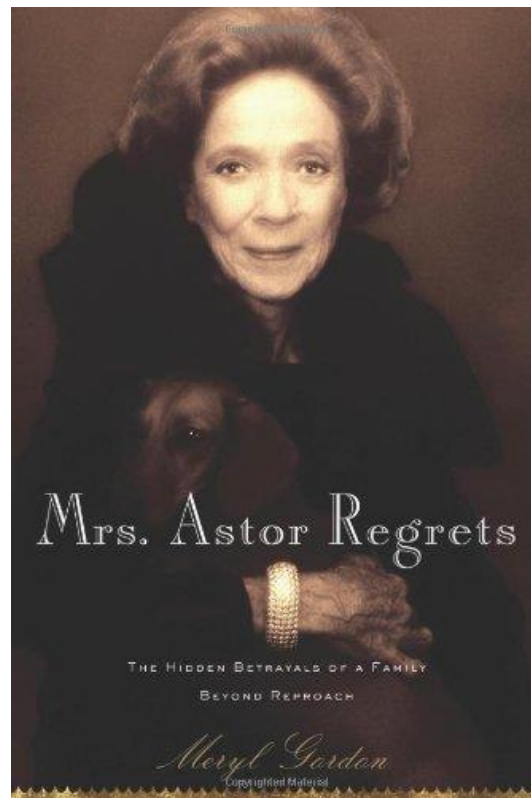
Liza Horvath is a Certified Trust & Fiduciary Advisor, a Licensed Professional Fiduciary and Accredited Investment Fiduciary. Liza and her Team at Monterey Trust Management provide professional Trustee, Executor and Fiduciary Services in addition to being a multi-family office.

SUGGESTED READING

Mrs. Astor Regrets, the Hidden Betrayals of a Family Beyond Reproach

By Meryl Gordon

Brooke Astor was a glamorous and respected socialite of New York society. Thanks to her husband, Vincent Astor's largesse, Mrs. Astor became an icon of philanthropy funding libraries, museums, the Bronx Zoo, and preserving historic Harlem houses. Her close friends included the likes of David Rockefeller, Nancy Kissinger, and Barbara Walters. As Mrs. Astor ages, her only son, Tony, steps in to take care of her and manage her estate. With such a fortune, why was this lovely and elegant woman left, at the end of life, to live in a scarcely furnished Park Avenue home, isolated, and with little help? While the story devolves into a tragic "ending," it provides us with a glimpse of the wonderful and meaningful life of Brooke Astor which culminates with her son, Tony, standing trial for neglect and abuse. *Mrs. Astor Regrets* is a well-researched and well-written book that you will want to read again and again.



[Click Here to Purchase!](#)

SPOTLIGHT – MTM TEAM MEMBER:

Connie Chisum

Connie Chisum has been a vital team member of Monterey Trust Management since 2014. In her position with MTM, Connie oversees the daily administration of trusts and works closely with clients and business partners to make sure the services we provide continue to meet ~ and exceed ~ client expectations.

Connie helps lead the team at MTM by using the same philosophy she used in raising her three successful and upstanding children: a commitment to kindness, consistency, and a focus toward success.



To Subscribe to Future Newsletters, visit montereytrust.com