

Michael Gilfix’s Book on Estate Tax Avoidance a “Must Read”

We are on the brink of a tax catastrophe for millions of unwary Americans.

Commencing on January 1, 2013, the level of estate tax protection plummets to only one million dollars per person. Compare that to the \$5 million protection for the remaining days of 2012. Worse, the estate tax rate dramatically increases from the current 35% level to 55%.



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Think about this: 55% of everything you own beyond the first million dollars will go to the government. It is possible that Congress will pass new legislation to avoid this outcome, but few are optimistic that there will be sufficient cooperation to pass compromised legislation to get this done. This means that, in the view of most observers, it is more likely that not that you will face this punishing, devastating tax.

This is the focus of a new book by Michael Gilfix, *Beat Estate Tax Forever*. He explains the many steps that can be taken this year to take advantage of the “\$5 million opportunity” available for only a few more months. This book is as time sensitive as a book can be.

If your estate exceeds \$1 million – or if you are a couple and your estate exceeds \$2 million – you should seriously consider planning steps to reduce or eliminate your estate tax exposure by acting in 2012. This is the point made, replete with examples, in this new book.

For members of the Peace of Mind program, there are two opportunities. First, you may obtain a copy of the book for \$10, half of the retail price and one third less than the amount charged to others who purchase the book through our office.

Secondly, we are offering a seminar for POM members that will be presented by Mr. Gilfix at the Bay Café, which is located at the Palo Alto Municipal Golf Course, just down the street from our office.

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The fact is that millions of dollars hang in the balance. You can plan and protect your estate or you can do nothing, hope for the best, and expose your estate to devastating taxes upon your passing. Mr. Gilfix explains in the book – and will explain in the seminar – steps you can take that will protect your financial security while simultaneously avoiding the estate tax.

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To sign up for this POM seminar with Mr. Gilfix, contact our office as soon as possible. The seminar room holds only 60 attendees, so it is "first come first serve."

This special POM seminar will be held on Monday, June 25, 2012 from 6:00 PM – 8:00 PM. There is a \$10 registration fee. Attendees receive Mr. Gilfix's new book.



Special Invitation to POM Members and your family:

Break Through "Start Up" Financial Management and Investment Approach

Wealthfront is a classic Silicon Valley start up that was recently featured in the New York Times, The Economist and San Jose Mercury News. Its goal is to make financial management and investment management services economical, web-based, and successful for young investors, in particular.

Wealthfront's founder, Daniel Carroll & Director of Research, Jeff Rosenberger, PhD will talk about Wealthfront and its services in a seminar just for the Peace of Mind program members. Watch for your invitation for the date and time of this special event.

Bring your children and your grandchildren and other younger family members, in particular – or just send them. Wealthfront's primary focus is on younger investors, although it can be appropriate for anyone. Wealthfront has given

this investment seminar that we are offering to the Peace of Mind group at companies like LinkedIn, Facebook, Yelp, Fenwick & West, etc.

Wealthfront has been particularly successful in attracting young members of Silicon Valley's most successful new companies, including Facebook. Management fees are extremely modest. They charge no fees for the first \$25,000 invested and 0.25% thereafter, so this is an excellent opportunity for young people to get started with a classic Silicon Valley start up that is likely to be very successful.

For more information, give us a call or email us at Ashleigh@gilfix.com.

UPCOMING EVENTS

1) POM MEMBER ONLY SEMINAR, BEAT ESTATE TAX FOREVER:

Monday, June 25, 2012, 6-8PM

Location: Bay Café,
1875 Embarcadero Road, Palo Alto, CA

Registration for this seminar is \$10.
(includes "Beat Estate Tax Forever" book)

***Please call (650) 493-8070
immediately to register for the POM
Seminar as space is limited.***

2) TELL YOUR FRIENDS ABOUT OUR PUBLIC SEMINARS! REGISTRATION IS \$25.

BEAT ESTATE TAX FOREVER WITH MR. GILFIX:
(includes "Beat Estate Tax Forever" book)

Thursday, June 7, 2012, 2-4PM

Location: Crowne Plaza Cabana,
4290 El Camino Real, Palo Alto, CA

BEAT ESTATE TAX FOREVER WITH MR. GILFIX:
(includes "Beat Estate Tax Forever" book)

Tuesday, June 12, 2012, 2-4pm

Location: San Mateo Marriott,
1770 South Amphlett Blvd., San Mateo, CA

Coming Soon!

3) Wealthfront's presentation at the Bay Café.

***If you or anyone you know might benefit
from our upcoming public events, direct
them to www.gilfix.com for further
information***