



PEACE OF MIND™ Newsletter

“Exclusively for POM Members”

2300 Geng Road, Suite 200
Palo Alto, California 94303

Summer, 2015

Peace of Mind Party

**Live Music by Shanna Gilfix &
Myra Gerson Gilfix**

On Monday, June 22nd, we are throwing a party for our Peace of Mind members. Join us at the Bay Café, just down the street from our office, at 6 pm for a casual **wine and cheese** event.

Live music! Shanna Gilfix, your POM Administrator, is an accomplished singer (to see one of her most successful songs, visit <https://www.youtube.com/watch?v=axV8DQ1nWNk>). Shanna and Myra Gerson Gilfix will make the evening even more fun. Music of the 40s, 50s, and 60s – your favorites!

There is no cost to you. It is our way of thanking you for your membership in our Program and being a part of our community.

The room only holds about 60 people, give a call or email to sign up. It is “first come first serve.”

LIVE MUSIC!



New Offer: POM Rewards Program – Make a Referral

Members of our Peace of Mind Program make a remarkable number of referrals to us. You refer relatives, friends, other professionals for estate and tax planning, in particular. We are always grateful.

To acknowledge and thank you for such referrals going forward, we created a new POM Rewards Program.

When you refer a client to us, be sure to let us know. We will give you an extra year of membership in the Peace of Mind Program for every referral who hires us for legal services.

When you refer someone to us, remind them to tell us that you made the referral.

As always, we thank you and appreciate your confidence in us.

Your Wealth and Its (Potential) Impact

Last year a dear client passed away. She left an \$8 million estate. She had no children and was rather isolated.

Her trust identified distant cousins as beneficiaries because they were her "only relatives." She barely knew them.

Distant relatives, virtual strangers, inherited very significant wealth from a woman they barely knew.

What else might she had done?

Potential for Impact, Public Good

She might have left all or most of her estate to charitable organizations that do the work she values. We believe that this would have given her satisfaction and meaning.

She may have been concerned about education, the environment, animals or nuclear weapons. She may have favored her senior center or university.

All of us should think about the potential social impact that we can have with our bequests. Consider, for example, the impact on her local senior center or autism organization if our departed client left half of her estate (\$4 million) to such organizations. Instead, strangers got a windfall; her community was ignored.

Even a small bequest can have an enormously positive impact.

A GILFIX SEMINAR What You Need to Know About Long-Term Care Planning

In this Palo Alto seminar, attorneys Michael Gilfix and Mark R. Gerson Gilfix will make sense of this very complicated topic.

- What is the probability that you will need long-term care services?
- What is the cost of home care, assisted living, and skilled nursing care?
- How can you protect your residence while qualifying for Medi-Cal to pay the cost of skilled nursing care?
- How can your other assets be protected while planning for Medi-Cal?
- What is the role of long-term care insurance and when can you "self-insure?"
- What are the pros and cons of reverse mortgages?
- How can you ensure quality in long-term care settings?
- What is the adult child's perspective on the parent's long-term care needs and costs?

Their book, [Facing the Reality of Long-Term Care](#), will be available for attendees.

Date: Tuesday, June 9, 2015

Time: 2:30 to 4pm

Location: Avenidas, Rm BC 7382
450 Bryant Street, Palo Alto, CA

Please call Avenidas at (650) 289-5400 to RSVP.

UPCOMING EVENTS

PEACE OF MIND MEMBER ONLY SEMINAR

PEACE OF MIND PARTY MONDAY, JUNE 22, 2015

6:00 PM
Bay Café
1875 Embarcadero Rd
Palo Alto, CA 94303

Please call (650) 493-8070. Space is limited.

AVENIDAS WORKSHOP TUESDAY, JUNE 9, 2015

2:30 - 4PM
Avenidas
450 Bryant Street
Palo Alto, CA 94301

Please call Avenidas at (650) 289-5400.

Space is limited.



★Use or Share your FREE hour POM consultation★

Remember: If you do not plan on using your annual consultation, let a family member use it. It is transferrable. Use the attached certificate and just make the appointment!

PEACE OF MIND

FREE CONSULTATION* CERTIFICATE

I/We, _____, give to _____
[POM Member] [Recipient]

our 20____, annual free Peace of Mind Consultation to be used on or before
_____, 20____.

Dated: _____

[POM Member]

[POM Member]

*When calling to make this appointment, please indicate that you have this Certificate.



GILFIX & LA POLL ASSOCIATES, LLP

PEACE OF MIND

Member Newsletter

UPCOMING EVENTS

Peace of Mind Party
Monday, June 22, 2015
6:00 pm

Gilfix Seminar: What You Need to Know
About Long-Term Care Planning
Tuesday, June 9, 2015
2:30-4:00 PM

*Gilfix &
La Poll*
Associates LLP 

**EXCLUSIVE
NEWSLETTER
FOR POM MEMBERS
ONLY**