



PEACE OF MIND™ NEWSLETTER

“Exclusively for POM Members”

2300 Geng Road, Suite 200
Palo Alto, California 94303

Spring, 2016

OUR BOUNTIFUL PEACE OF MIND PROGRAM!

We now have well over 400 members of our client community who have joined the Peace of Mind (POM) program. Every year, the number grows larger.

We remind you that you have a free hour consultation each year – and that you can give it away to a child, other relative or a friend. We want you to use that free hour!

We remind you of our many seminars exclusively for POM members. While attendance is always high, far too few take advantage of them.

They are enjoyable and full of information.

Be sure to fill out a questionnaire. This helps us identify planning issues that require attention. Recently, for example, **we learned that one spouse developed serious dementia**. We reached out to that family and we are now doing protective planning on their behalf. In another matter, **we learned that a grandchild is autistic**. We communicated with our clients and their children to be sure that a Special Needs Trust is created for that child.

You will enjoy the benefits of this program if you take advantage of them. We are available to you and look forward to providing even more services in coming years.



HOW TO USE YOUR POM MEMBERSHIP

Your Free Hour Consultation

Just give us a call. This consultation can be on any topic. One couple met with us to discuss concerns about a son-in-law's behavior. It had virtually no direct planning implications, but they were so worried that they needed a professional with whom they could confide and consult.

One POM member gave her free hour to her niece, who resides in Mountain View, California. Her niece faces very challenging long-term care needs. We put together a plan to help her obtain Medi-Cal coverage for nursing home care which appears to be inevitable, while protecting her residence for her two low-income children.

Call with Your Questions

You can call with questions about your trust and there are no fees. One caller asked about titling her one-third interest of a vacation property purchased with other relatives. Another member called with questions about specific terms in her Advance Directive.

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Another called to ask about the role of her Durable Power of Attorney when dealing with her husband's bank account – how much power she has and what the limitations are. A POM member called to ask about the “pros and cons” of transferring stock in a startup company into the Family Protection Trusts she established for her daughter.

If you have questions, give us a call.

NEW DEVELOPMENTS

ABLE Act and “Right to Die” Legislation

These are two very topical legislative developments. We have already disseminated information to members of the Peace of Mind Program about both.

The ABLE Act enables individuals to transfer money into an account for the benefit of a disabled individual without disturbing his eligibility for government benefits. Such an account can hold up to \$100,000. There are many details and exceptions that have to be considered. Moreover, these accounts are not yet available in California. They should be available later in 2016.

California's Right to Die legislation receives a great deal of notoriety, but it is in fact very limited. We presented a POM seminar on this topic in February 2016. If you have questions about it, be sure to consult with us. Once it goes into effect, we may offer still another seminar if we have requests.

ATTEND OUR 12TH ANNUAL SPECIAL NEEDS TRUST SEMINAR

On May 5, we offer our 12th Annual two-hour seminar in Palo Alto. This is very important for those of you who have children or other family members who live with a disability. Attorneys Michael Gilfix and Mark Gerson Gilfix explain the public benefits system, the role of Special Needs Trusts, the ABLE Act, and how it all fits together.

We are blessed to have approximately a dozen non-profit organizations serving the disabled community as partners. Most will be present at the seminars to distribute information about their services.

On May 5, the seminars are from to 2:00 – 4:00 PM and from 6:00 – 8:00 PM.

We ask you to do two things. First, spread the word – tell your friends and relatives. Have them register.

Secondly, you should register and attend. We assure you that it will be informative and enjoyable.

Date: Thursday, May 5, 2016

Time: 2:00 – 4:00 PM and 6:00 – 8:00 PM

Location: Crowne Plaza Cabana
4290 El Camino Real, Palo Alto, CA 94306

***Please register online at
www.Gilfix.com or call us at (650)
493-8070.***

UPCOMING EVENTS
12TH ANNUAL SPECIAL
NEEDS TRUST SEMINAR
THURSDAY, MAY 5, 2016
2:00-4:00PM and 6:00-8:00PM
Crowne Plaza Cabana
4290 El Camino Real
Palo Alto, CA 94303
Please call (650) 493-8070. Space is limited.

EXCLUSIVE PEACE OF MIND SEMINAR

Thursday, April 14, 2016
2:00-3:00 PM
Bay Cafe
1875 Embarcadero Road
Palo Alto, CA 94303

Please call 650-493-8070 to RSVP.

★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

12TH ANNUAL SPECIAL NEEDS TRUST SEMINAR

THURSDAY, MAY 5, 2016
2:00-4:00PM and 6:00-8:00PM
Crowne Plaza Cabana
4290 El Camino Real
Palo Alto, CA 94303

*Gilfix &
La Poll*
Associates LLP 

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ONLY**