



PEACE OF MIND™ NEWSLETTER

Exclusively for POM Members

801 E. Charleston Road
Palo Alto, California 94303

March, 2026



Grounding & Presence to Encourage Peace of Mind

We have a suggestion: Take a second and notice 5 things you can see right now. This simple act pulls your mind out of the future and into the present.

Now, after that restful moment, peruse our newsletter.

How Your Annual Questionnaire Saves Money, Changes Lives

When you fill out and send in your annual questionnaire, be assured that we carefully review it. When you identify significant changes, we respond, we reach out.

In the five most recent matters where information on the questionnaire led to a proactive call from our office and involvement, our estimate is that we saved at least **\$420,000** for those POM members by recommending and making changes to avoid

tax and/or to achieve additional government benefits.

What is the Actual Value of Your Membership in our Peace of Mind Program?

- *By using just one of your no-fee annual consultations, you nearly cover the entire cost of membership.*
- *Your 15% fee discount on updating your estate planning documents saves an average of \$450.*
- *The value of our POM-only webinars and seminars is infinite!*

The fact is that POM members get preferred services on so many levels.

When you renew, be sure to ask Shanna about updated and additional benefits.

POM Webinar

Estate Planning in the Age of AI

This webinar will explore the benefits of AI and the caveats.

- The arguable benefits of AI drafting of documents.
- The downside of reliance on AI.
- Litigation will flourish, not diminish.
- Responsible use of AI.

Wednesday, April 22 at 1PM

Register at www.gilfix.com/peace-of-mind/webinars

How POM Members Used their Hour

Mrs. T shares ownership of her home with her son. She and her son came to see us because her son wants to transfer his half interest in the house to his brother.

Their realtor, a long time friend, prepared the deed, which they were about to sign.

We advised that, because of Proposition 19, the transfer would have generated a \$30,000 property tax increase. As a result, the transfer will not take place at this time. Property tax increases of \$30,000 per year are now avoided.

JL had us implement powerful, protective steps with regard to his residence and a rental just before Prop 19 became law.

Notwithstanding the avoidance of any property tax increases when we did this work, one of his buddies checked with his attorney who told him that the approach we took will not work and that a property tax reassessment is looming. This caused some consternation.

We walked through the documents and entities prepared for him and reassured him that steps taken before Prop 19 became law were effective – and that he need not worry.

The avoidance of worry is one of the best, most powerful benefits of participation in the Peace of Mind program. As members, you know this. Be sure to renew your membership going forward since you never know when you will need reassurances, explanations, and other steps to protect your “peace of mind.”



Property Tax Savings for Three POM Members

In the past quarter, three POM members used their free POM hour to express concerns about massive property tax increases that would occur upon their passing. In all three, we are retained to take all possible steps to avoid property tax increases.

- For one client with a home valued at \$4.5 million, tax savings over the first 10 years alone will approach \$400,000.
- For a family with a special needs child, this will enable them to keep the house as a permanent residence for their child.
- For all three, they will have the best of both worlds: a child will acquire ownership and either a) retain ownership of the house with no property tax increase or b) sell the property with no capital gains tax.

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★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

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**NEWSLETTER
FOR EXCLUSIVE
POM MEMBERS**

A starburst graphic with multiple points, containing the text "NEWSLETTER FOR EXCLUSIVE POM MEMBERS".