



PEACE OF MIND™ NEWSLETTER

Exclusively for POM Members

801 E. Charleston Road
Palo Alto, California 94303

January, 2026



Family Values and Sustenance

In the webinar presented to members of our Peace of Mind program on December 16, we reported some startling data: According to research done by Dr. Karl Pillemer, about 27% of Americans who are 18 years of age or older are somehow estranged from one or more of their family members. While shocking on many levels, it is not inconsistent with so many of the family stories we hear as we prepare estate plans for our enormous client community. As we say so often, you have to tell us everything so that we can be comprehensively able to advise you. You tell us things about the family that you tell no one else!

Estrangement is painful on so many levels. It may flow from political disagreements, lifestyle choices, or mental or physical health problems. Regardless of source, the erosive impact on a family is deeply troubling.

While some estrangement is irreparable, most is not. The fact is, we need our family members. Notwithstanding the supposedly

paramount role played by friends in the television series, *Friends*, lifelong commitments of family members are typically irreplaceable.

What to do? Some of the best advice is from another advisor, Stephen Goldbart. His message is the same as ours over the years: To maintain positive family connections – and to maximize the likelihood that family wealth will be preserved – nurturing shared purpose and shared family values are at the core. If family members share values, everything from personal care decisions to Thanksgiving table discussions become a source of joy and reinforcement rather than estrangement.

As we counsel families about their estate planning, these issues are at the core. After all, the work we do is not about trusts and tax.

The work we do is a focus on taking care of families – particularly over multiple generations.

POM Seminar
**POM Membership Benefits –
New and Old**

Tuesday, February 3, 2026

2PM

Bayland Golf Links
1875 Embarcadero Rd, Palo Alto

Call 650-493-8070 or email
ashleigh@gilfix.com to RSVP

Peace of Mind Seminar

Benefits of POM Membership - New and Old

You know about webinars, free consultation, and annual questionnaire.

What do we do with your annual questionnaire – More than you think!

- Creative use of no-fee consultation.
- Stories – how one “random check in meeting” saved a client \$200k and more.

You may not know about new benefits:

- Patient advocacy and protection consultation if entering the hospital
- Coordination of financial and insurance planning with your estate planning
- Free year membership when you refer to us
- Free litigation consultations
- And more!

Michael Gilfix and Mark Gilfix will present this seminar **February 3 at 2PM at Bayland Golf Links.** Call 650-493-8070 or email ashleigh@gilfix.com to RSVP.

How POM Members Used their Hour – Or Didn't

Ms. C decided to give her consultation to her father. While he has an estate plan in place, he has serious questions about managing his estate, estate tax exposure, charitable giving, and how all of these objectives can be harmonized.

Since he already has an estate planning attorney, we authored a rather detailed planning letter to identify creative and effective alternatives so that he can eliminate or reduce estate tax exposure. The recommendations

include considerations of a Family Foundation.

The beauty of this meeting is that we are giving him options. Indeed, our core role is to identify planning options so that a well informed client can make appropriate decisions.

Mrs. T was a member of the Peace of Mind program for many years. We annually sent her a list of assets titled in her trust. She annually modified and updated it.

She then dropped her membership about five years ago.

Thanks to her banker, she was reminded that her many bank accounts have to be titled in her trust if probate is to be avoided.

Had she maintained her membership, we would have annually reminded her and updated her “Schedule A” to include a complete list of all bank accounts. Had she done this, formal probate would be avoided even if she failed to retitle the bank accounts as her financial institution.

She is now reinstating her membership and we are taking care of all titling. The avoidance of probate will save her family tens of thousands of dollars and an enormous headache down the road when she passes.

She is now a proud new member of our Peace of Mind program.

Remember, if you don't use your free hour, give it away to a relative or friend.



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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

POM Seminar

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*Gilfix &
La Poll*
Associates LLP 



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FOR EXCLUSIVE
POM MEMBERS**