



PEACE OF MIND™ NEWSLETTER

"Exclusively for POM Member's"

2479 E. Bayshore Road, Suite 220
Palo Alto, California 94303

Fall, 2020



Attorneys Michael Gilfix and Myra Gerson Gilfix are the 2020 Recipients of the Theresa Award

Michael Gilfix and Myra Gerson Gilfix were jointly awarded the Theresa Award, given annually to individuals who distinguish themselves for exceptional services to individuals with disabilities. Based in Lido Beach, New York, the Theresa Foundation has worked for years to enhance and enlarge services for individuals with disabilities.

The Theresa Foundation provides a grant of \$5,000 to non-profit organizations identified by the annual award recipients. Accordingly, Michael and Myra designated two organizations in Santa Clara County to share the award. One is the Pacific Autism Center for Education (PACE), based in Santa Clara, California. The other is Life Services Alternatives (LSA), based in San Jose. PACE provides a panoply of educational and other services as well as group homes. LSA has

raised millions of dollars to purchase land and build group homes in Santa Clara County.

Watch the acceptance video at:

<https://www.youtube.com/watch?v=Wse4x080Fps&feature=youtu.be>

And view the Theresa Foundation Newsletter at: https://theresafoundation.org/wp-content/uploads/TARF_Newsletter_SUMMER_2020.pdf

Exclusive POM Webinar Home Care with Greg Hartwell

Tuesday, October 6 at 11AM via Zoom

Greg Hartwell is the Managing Director and Co-Founder of Homecare California which he started in 2008 with his wife Lisa. Homecare California provides non-medical care services to enable older adults to live as independently as possible at home. Those services include meal preparation, transportation, medication management and reminders, personal care, companionship, exercise, dementia care and other activities of daily living.

The presentation will focus on how you obtain in-home care, the cost of care, and how to approach care to maximize independence and improve quality of life. This is a remarkable opportunity to learn about the world of supportive care services. Greg will also allow time to answer your questions.

Politics and Reality: What will Change?

Tax, estate, asset protection, and public benefits planning can be particularly challenging in election years. This is certainly the case in 2020.

There are proposals to increase income tax, decrease the level of estate tax protection, and generally increase taxes on the wealthy. Depending on the context, there are different definitions of "wealth."

There are precious few viable proposals to expand government benefits for those in need. Housing needs of disabled adults are in dramatically short supply. It is difficult to be optimistic about this annually increasing problem.

All of this underscores the need for protective planning. Special needs trusts remain the paramount planning tool for the benefit of individuals with disabilities, integrating tax and other protective planning techniques. Family Protection or Dynasty trusts are more important than ever to protect inherited family assets.

We expect the weeks after the election to be exceedingly busy for these and related reasons. Indeed, election results will affect planning for your family.

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RSVP by calling 650-493-8070 or visit www.Gilfix.com/peace-of-mind/



How POM Members Used the Free Hour

Mr. & Mrs. T consulted with us because they want to provide a permanent residence for their special needs son. The questions focused on how ownership would be titled and its potential impact on eligibility for government benefits.

Ms. L's mother suffers from dementia and lives with care givers in her comfortable home in Woodside. A professional fiduciary serves as trustee for this substantial estate. Mr. L has encountered some difficulties in taking care of her mother's health care needs since the trustee manages all finances and some disagreements have arisen. A number of approaches were identified to ameliorate current communication problems.

Mr. & Mrs. Y had us create a very sophisticated estate and tax plan. Their one child, who is also their successor trustee, has an excellent job and is building his own estate. Mr. & Mrs. Y advised their son to meet with an attorney in our office to prepare his Trust, Power of Attorney, and Advance Health Care Directive. Mr. & Mrs. Y gave their free annual hour consultation to their son, who met with an attorney in our office to prepare his estate plan.

Remember to give away your free hour if you do not use it!

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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

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Member Newsletter

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