



PEACE OF MIND™

NEWSLETTER

"Exclusively for POM Member's"

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

Summer, 2020



We Are Available

Millions of Americans realize that they need to have their basic estate planning documents in place. Members of our client community realize you have to regularly update your plan. The COVID-19 crisis teaches this lesson.

Countless individuals have contacted us, finally understanding that they need to get their house in order.

Too many believe that they have to wait until things "return to normal" before doing their planning. That is not the case.

We are having most of our new client meetings by Zoom or by telephone. For clients who want to come to the office, we have meetings in our office with an attorney. We are extraordinarily careful and are protecting both our staff and our clients.

Do not hesitate. Make sure your plan is in place and up to date. Do not wait. You need to be prepared.

If you have any needs in this regard, call now. Don't put it off.

Advance Directives, Health Care Decision-Making, and Being Safe in the Hospital.

Over 50 members of the Peace of Mind program signed up for the April webinar presented by Myra Gerson Gilfix and Michael Gilfix on Advance Directives, health care decision making, and being safe in the hospital. The webinar was practical, generating over a dozen questions from attendees. We explained the role of the "patient advocate" in doctor visits and hospitals. We explained the interplay of the advance directive, the POLST form and DNR orders. It was practical, not theoretical.

- Watch for other webinars – the next is on May 26.
- Give us your suggestions about topics you would like us to address.
- Join us on Zoom, which is remarkably easy to use. You have to make a **single "click"** of your mouse.

Exclusive Peace of Mind Webinar

Responsibilities of your Named Agents

Tuesday, May 26, 2020
11:00AM

You can now watch past webinars in your Peace of Mind online portal!

How POM Members Have Used Their Free Hour

Ms. D used her free hour because she is concerned about the pandemic and health care decision making. She attended one of our recent webinars in which we focused on Advance Directives and “being safe in the hospital.” As a result, we are modifying the terms of her Advance Directive, including more detail and changing the name of her health care decision making agent.

This resulted in changes to her trust since she wants to reward the child who is providing her with daily assistance and giving her very personal “peace of mind.”

Mr. & Mrs. L made full use of their annual hour in April. The terms of three Family Protection Trusts were examined, as was the identity of their successor trustee. Significant adjustments are being made in their distribution plan in light of developments on the part of their three children.

Moreover, we are asked to undertake protective planning steps for one of their children, residing in Southern California. The goal is to integrate planning for these two generations.

Use your free annual hour! As we prepare for these consultations, we review your plan, your issues, and questions previously raised. In other words, we address issues you might have forgotten about.



Free Planning for First Responders

We want you, core members of our client community, to know about this.

We are offering free, basic estate planning documents for first responders and those on the “front line” of medical care for individuals affected by COVID-19. These documents include a Will, a Durable Power of Attorney, and an Advance Health Care Directive for each individual.

We are running half page ads in the *San Jose Mercury* to announce this program, which we affectionately call “Docs for Docs.”

In this way, we hope to express our appreciation in very concrete ways to individuals who are taking care of us when the need arises.

If you know firefighters, hospital orderlies, nurses, doctors, or EMTs who are first responders, tell them about our offer so we can help them out. They can email us at freedocs@gilfix.com.

UPCOMING EVENT

Responsibilities of your successor trustee and those named in your Power of Attorney and Advance Directive?

Tuesday, May 26 at 11:00 AM
Presented by Michael Gilfix and Mark Gilfix

If you become incapacitated, your critical estate planning documents come into play and ensure that someone will be able to take care of virtually everything for you.

- What powers are allocated under each of your documents?
 - Revocable Trust
 - Durable Power of Attorney

- Advance Health Care Directive
- Under what circumstances do these documents and roles come into play?
- Are these individuals to be compensated? If so, how is the rate of compensation determined?
- How are these roles coordinated to avoid overlap and conflict?

Join us for an interactive discussion about the role of your many estate planning documents and how they fit together.

We strongly encourage you to bring the individuals named in your documents and given such responsibilities. Most important is the individual named as your successor trustee.

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

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Member Newsletter

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