



PEACE OF MIND™ NEWSLETTER

“Exclusively for POM Member’s

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

Winter, 2019-2020



Holiday Greetings!

As we move toward the end of the year and the new year of 2020, we take a moment to note how blessed we are to a part of so many lives, taking care of so many families.

Let me share some important updates with you.

Our very popular book about Special Needs Trusts will soon be available in its 3rd edition. We added an explanation of the new ABLE Act and its operation in California. We changed the name of the book to *“Special Needs Trust and ABLE Act Creation and Management Guide.”*

Our other two books, *Facing the Reality of Long Term Care*, which I co-authored with Mark Gilfix, and *Beat Estate Tax Forever*, also remain available.

Related to our special needs leadership, Mark Gilfix recently spoke about Multigenerational Planning at the annual meeting of the Autism Society at Stanford University. Mark is also active on the Board of Directors of the Pacific Autism Center for Education (PACE).

We have some staff developments to share with you.

Attorney Elijah M. Keyes is no longer with our office. We will miss Elijah, who was with us for a

number of years. Those of you who worked with Elijah will of course be taken care of without interruption.

Angelica Suzuki recently joined our firm in case management. Many of you have met Angelica in signing appointments, where you have experienced her warm and positive energy.

Everild Baris joined us as a case manager, also bringing a wonderful smile and energy to our office. As many of you already know, Lynne Haro and Victoria Okorakpo joined us to manage our front desk and take responsibility for many aspects of client relations. They work very hard to help us to serve you.

You have no doubt spoken with Lynne or Victoria over the past year.

We are thrilled to have all of our wonderful new staff members and we hope you get to meet them all soon.

We look forward to a vibrant, successful, and joyous new year. We look forward to talking with and being available to you.

Michael Gilfix, Esq. Mark Gilfix, Esq.
Francis A. La Poll, Esq. Cecelia Fusich, Esq.
Myra Gerson Gilfix, Esq. Stephen Vernon, Esq.
Nicholas Klingenberg, Esq.

Peace of Mind Seminar
Healthcare Decision Making
Presented by Michael Gilfix and your GLA
Team of Advisors

Tuesday, February 11, 2020
2:00 PM
Baylands Café -1875 Embarcadero Rd.

Call 650-493-8070 to RSVP



Use Your Free Hour Annual Consultation!

While many members of our Peace of Mind program utilize their free annual hour consultation – or give it away to their children or other family members – most do not. We understand that most of you do not have a feeling of need or urgency with any questions that might have arisen.

You should come in anyway, if only to check-in.

There are two major reasons why you should meet with us annually. First, you don't know what you don't know.

Many members of the program have learned about approaches to avoid capital gains tax, property tax increases, and estate tax. They learned of options of which they were completely unaware.

Others learned of programs that can help pay for the cost of long-term care. There are countless examples.

The second reason is that the law and opportunities are constantly changing and evolving. This is true of tax, tax implications of different types of trust, and eligibility rules for Medi-Cal, the program that can pay for the cost of long-term care and even in home services.

So make that appointment. Talk with us.

We can do it by telephone or Skype: Don't let distance or traffic be a barrier. We can do a consultation by telephone or by Skype so you can stay at home and still meet with us to address any questions you have or to simply be sure that your affairs are in order.



Peace of Mind Seminar Healthcare Decision Making: Your Advance Directives, End of Life Planning, the Cost of Dying

In this seminar, we will explore the challenges and opportunities in the realm of health care decision-making. Our focus will be on situations where one is seriously ill and perhaps facing choices about life-sustaining treatment.

Bring your questions on Tuesday, February 11 at 2PM to the Baylands Café in Palo Alto.

Bring your family members, particularly those who are named in your Advance Directives to make healthcare decisions for you.

Annual Questionnaire and Schedule A

We annually send you a questionnaire and copy of your current Schedule A for review. It is important you complete the questionnaire, which lets us know if there are issues that will require attention. An up-to-date Schedule provides your successor trustee with a complete list of assets and means that we can avoid probate even if you did not properly title such assets in the name of your trust. **So fill in the questionnaire, review the Schedule, and respond every time you get our mailing!**



UPCOMING EVENTS

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1875 Embarcadero Road, Palo Alto

Peace of Mind Seminar

**Presentation by Claire Day
Of the Alzheimer's Association**

This is a POM Seminar we are planning. We
hope to schedule it in March, so look out for
an invitation to join us!

Please call (650) 493-8070. Space is limited.

★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

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Healthcare Decision Making

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