



# PEACE OF MIND™ Newsletter

*“Exclusively for POM Members”*

2300 Geng Road, Suite 200  
Palo Alto, California 94303

Winter, 2014/2015

## A Very Special Holiday Greeting

We have a special relationship with you, members of our Peace of Mind Program. We look forward to ongoing close communications. We look forward to taking care of you and your family.

Enjoy the holidays!

All of us at Gilfix & La Poll



## A Gift to your Child for the Holidays:

### Your Free Hour with Gilfix & La Poll

What are you giving your kids for Christmas or Hannukah? A membership in AARP? Tickets to sumo wrestling?

Why not wrap up your free Peace of Mind consultation, put a bow on it, and give it to one of your kids or other close family members? Very seriously, this is a gift that

would have meaning. It would give them an opportunity to learn about your plan – if you give us permission to speak with them about it. Alternatively, they can talk about their own planning for their own families.

We recently met with a client's son who was given the free consultation by his mother and father. The son, who is their successor trustee and who will be trustee of his brother's Special Needs Trust, understands for the first time what his role will be. He understands that he has significant responsibilities, that he is to be compensated for his services, and that he has our professional staff to back him up. It was a very successful and enjoyable meeting.

Shall we send you the ribbon?

## Gilfix in the Media

*San Francisco Chronicle* and *San Jose Mercury News*

Within the space of one week, reporters from both the *San Francisco Chronicle* and the *San Jose Mercury News* contacted, interviewed, and quoted Michael Gilfix in articles about proposed Medi-Cal legislation.

Proposed legislation would stop the state Medi-Cal program from obtaining reimbursement for Medi-Cal benefits paid to newly eligible Medi-Cal recipients, age 55 and older, under expanded Obamacare Medicaid coverage.

In both articles, Mr. Gilfix explained that, even without this legislation, such Medi-Cal

reimbursement or Medi-Cal recovery claims can be avoided – with good planning.

We are pleased that the two major media outlets in the Bay Area both chose to consult with and rely on Mr. Gilfix.

#### *Wall Street Journal*

On March 28, 2014, Mr. Gilfix was quoted in a Wall Street Journal article entitled, “Finances and the Aging Brain.” Wall Street Journal columnist, Jason Zweig, contacted Mr. Gilfix for his article that focuses on susceptibility to financial abuse when an individual ages and suffers from diminished capacity.

#### *Trusts & Estates Magazine*

Mr. Gilfix specifically addressed steps that can be taken to prevent elder financial abuse in an article that appears in the September, 2014 issue of Trusts & Estates Magazine. The title of that article is “Addressing Financial Elder Abuse: Should the bar for protective intervention be lower?” Contact our office if you would like a copy of his article, which includes a number of practical recommendations.



## **Examples of “Gifted” POM Hour**

While most of our 400 plus members of the Peace of Mind Program utilize their free annual hour consultation with a Gilfix & La Poll Attorney, some of you do not.

Here are two current examples of how this free hour has been creatively utilized.

One POM member contacted us with a question about proposed federal legislation that would affect government benefits for a family member. She asked us to research the legislation and write a letter with a summary of its benefits and of its status.

Another POM member gave her free hour to a nephew and his wife, as they just had a child and had many questions about steps they can take to protect their new daughter.

The point: it does not have to be the traditional “one hour consultation.” Be creative! Use that hour since it is a win-win proposition.

## **POM Seminars**

Over the past four months, over 160 POM members attended one or more of our POM-exclusive seminars.

Topics included digital assets, IRA trusts, and long-term care planning.

Watch for our 2015 seminars and join us!



# UPCOMING EVENTS

PEACE OF MIND MEMBER ONLY SEMINAR

**IRA SEMINAR --  
BY POPULAR DEMAND**  
Stretch IRAs, 401(k)s -- Taking  
Care of the Grandkids

Wednesday, February 11, 2015

**6:00PM**  
**Bay Café**  
**1875 Embarcadero Rd**  
**Palo Alto, CA 94303**

*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

## **UPCOMING EVENTS**

**IRA Seminar -- By Popular Demand:  
Stretch IRAs, 401(k)s -- Taking Care of the  
Grandkids**

**Wednesday, February 11, 2015 at 6:00 pm**

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

**EXCLUSIVE  
NEWSLETTER  
FOR POM MEMBERS  
ONLY**