



## Peace of Mind Member Benefits

We know there are times when you have a question regarding your estate planning and want to call without worrying about extra fees. We believe our Peace of Mind Trust Maintenance Program removes this concern while ensuring your trust is well maintained. We offer the following services for a two year period for a fixed fee:

1. **Free telephone consultations regarding your revocable and irrevocable trusts, general durable power of attorney and advance health care directives** and their maintenance with a Gilfix & La Poll Associates attorney or knowledgeable paralegal who is under the supervision of an attorney. If we determine that you require additional work, you will be informed of the cost and qualify for the discount listed on #7.
2. **A one hour consultation** at no charge with an attorney on any topic within our area of expertise, excluding trust administration and litigation, to be used annually. This gives you the opportunity to ask us questions unrelated to your trust completely free of charge.  
\*\* Give it away! Your free annual consultation can now be transferred or given to a family member or friend. If you won't use the hour meeting, share it with someone who would benefit.
3. **Annual review of changes in your life** which may affect your estate planning documents. Each year we will send a questionnaire to gather the information we need to conduct the review.
4. **Annual maintenance** of all trust asset schedules, which list major assets in your revocable trust. These schedules will be included with the annual questionnaire.
5. A special **POM Newsletter** focusing on trust matters. This is separate from our newsletter and is only available to Trust Maintenance Program clients.
6. **Special Seminars** exclusively for POM members including an **Annual Seminar** for POM members and your successor trustee. This seminar gives your chosen successor an opportunity to learn what it means to be a trustee.
7. A **15% discount on all additional work** other than litigation or trust administration.
8. **Exclusive access to the online POM Member page**. On our website's POM portal, members have access to free downloads, including Mr. Gilfix's *Special Needs Trust Creation and Management Guide*. Members can also ask questions online and receive answers from our attorneys more efficiently. POM members have been given log in information. Call us if you need assistance in this regard.

Please note that these benefits can only be realized with your active participation. We look forward to helping you fulfill the value of this program, so please contact us with any questions or concerns.