

JOHNSON, GASINK & BAXTER, LLP

TWO THINGS CERTAIN®

December, 2012



JGB Announces TrustGuard Protection Plan

December 1, 2012

At the request of our Trust-based Estate Planning clients, JGB has designed **TrustGuard™** to provide certainty that a Trust Plan is up-to-date, maintained and funded over time. Beginning in 2013, for an annual fee, members will be entitled to a **TrustGuard™ Annual Meeting** with their JGB Attorney to cover the following:

- Review of Estate Planning documents and updates as necessary for family/law changes
- Funding review and advice/guidance
- Review/discuss Estate Plan with children and/or Successor Trustees

In addition, **TrustGuard™** members receive the following benefits:

- Enrollment in our LegalVault document management/storage system
- Phone calls and emails to and from your JGB Attorney at no additional charge
- Reduced fee structure for new 2nd tier estate planning (i.e. QPRT, ILIT, FLP etc.)
- Reduced fee structure for new Estate/Trust Administration
- Disability Affidavits if required
- Mortgage Company Trust Opinion Letters if required
- 10% Fee Reduction extended to any **TrustGuard™** client's family member referred to JGB for Estate Planning service
- Free Notary Service at our Williamsburg Location
- Invitations to **TrustGuard™** client only events and programs

JGB remains committed to making sure all our clients are cared for with courtesy and skill. We will continue to work with our wills-based clients on an as-needed basis. We look forward to seeing you in 2013.



TrustGuard™ Frequently Asked Questions

What is TrustGuard?

TrustGuard™ allows you to feel secure knowing that the Trust Plan you spent a fair amount of time and money on is still current, effective, and meeting your needs. The law firm of Johnson, Gasink, & Baxter, (JGB) created TrustGuard™ for clients who are serious about protecting their investment in a Trust-based estate plan with an annual review of the plan and Trust funding, as well as annual updates.

Why would I want to join?

Often trust binders are forgotten on a shelf soon after execution. Even the most conscientious person can neglect to transfer key assets into a Trust. Changes in family and finances also are rarely reflected in a plan that has been safely locked away in a binder in a safe in the basement. TrustGuard™ is for people who want to make sure their Trust Plan is not thwarted by unexpected changes in the law, their family, or their assets.

Do I have to join?

No. You may continue to work with JGB and pay our standard flat or hourly rates for personal, phone, and e-mail service as needed. We are happy to work with you in or out of the TrustGuard™ Plan.

When can I join?

Look for your application to come in the mail in December. Those who sign up before Feb 1 save \$100 on their annual enrollment.

Can I drop out of the program?

Yes. Each year you choose to re-enroll. Those who de-enroll will be barred from enrollment for two years and will receive service at our standard rates as needed.

Can I join if I am not a JGB client?

Non-clients may join after JGB has created new documents for them. We are always honored to serve your family and friends.

How much does it cost?

Annual Enrollment is \$600 (\$500 if paid by Feb 1).



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About the Author:

Dan Gasink is an experienced problem solver who helps individuals and businesses achieve and protect their goals of prosperity, stability and growth through appropriate planning. Dan takes great pride in making sure that his work for clients is always reliable, correct, and on time.

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