

JOHNSON, GASINK & BAXTER, LLP

# TWO THINGS CERTAIN®

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December 2014

## News Roundup for JGB

By Dan Gasink

Happy Holidays to our clients and friends. 2014 has been a busy year for Johnson, Gasink & Baxter, LLP and this final newsletter for the year has two important items: our Williamsburg office is moving and TrustGuard™ enrollment for 2015 is now open.

### **New Office-**

**In January, JGB's Williamsburg office will be moving up the street to 1100 Professional Drive.** After five and a half years, we have outgrown our old office and the short move will take us to the front of the block. The new place boasts more room, an improved reception area, and a far superior ADA compliant ramp. We look forward to having you see our new office once it is spruced up and we have settled in. More details to follow when we have hammered out the moving date!

### **TrustGuard™ Enrollment**

JGB's popular and exclusive TrustGuard™ program has begun its annual open enrollment period. For our clients who are unfamiliar with our TrustGuard™ program: TrustGuard™ is a proprietary, JGB built client service program that allows you to feel secure knowing that the Trust Plan you spent a fair amount of time and money on remains current, effective, and relevant for your needs. We created TrustGuard™ for our Revocable Living Trust 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. (See our website: [http://jgblp.com/lawyer/TrustGuard%E2%84%A2\\_cp6535.htm](http://jgblp.com/lawyer/TrustGuard%E2%84%A2_cp6535.htm) ).

The TrustGuard™ program is a **voluntary participation** program, billed at an annual flat rate. Any JGB Revocable Living Trust clients who are not enrolled in TrustGuard™ will pay for legal services rendered (that would otherwise be covered by the TrustGuard™ program) at our standard rates upon delivery of said services. If you pay your TrustGuard™ enrollment fee before February 1, 2015, you need only pay the reduced rate of \$500.00. However, any enrollments paid after February 1, 2015, but before February 28, 2015 (end of open enrollment), will be subject to the full TrustGuard™ fee of \$600.00.

### **What TrustGuard™ Includes:**

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

In addition, TrustGuard™ clients receive the following benefits:

- Access to 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

TrustGuard™ Enrollment Forms for the 2015 program year have been mailed to **EXISTING** TrustGuard™ 2014 active participants, as well as to JGB clients who created a Trust-based estate plan in 2014. Any other JGB Revocable Living Trust clients who would like to enroll in TrustGuard™ should contact JGB to acquire a TrustGuard™ Enrollment Form for the 2015 program year.

### **Happy Holidays!**

From all of us at JGB, thank you for being a part of our successful and happy 2014 and we look forward to serving you in the New Year! We wish you and your families a happy and safe holiday season.



### **Johnson, Gasink, Baxter, LLP.**

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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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