

JOHNSON, GASINK & BAXTER, LLP

TWO THINGS CERTAIN®

December, 2013

TrustGuard™ Year 1 a Rousing Success

By Jeremy C. Johnson

We are proud to report in this, the final Two Things Certain™ Newsletter of the year, that the JGB TrustGuard™ client service program for 2013 far exceeded everyone's expectations. We have had an overwhelmingly positive response from our TrustGuard™ clients about the program and its services. On November 14, 2013, we held our TrustGuard™ Annual Event. It was well attended and the Attorneys and Staff of JGB enjoyed sharing an evening of delicious food, drink and conversation with our TrustGuard™ clients. During this event we reviewed changes in the law that were addressed and corrected in client documents during this program year, as well as changes to the tax code and possible changes to state and federal laws that we are monitoring moving forward. In addition, we announced that for the 2014 TrustGuard™ program year, we will be focusing on how to prepare now so that your successor Trustees are informed and ready to assist you in the unfortunate event of death or disability, allowing the transition of control of your estate plan to be seamless.

For our clients who are unfamiliar 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 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.

The TrustGuard™ program is a **voluntary participation** program, billed at an annual flat rate. Any JGB 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, 2014, you need only pay the reduced rate of \$500.00. However, any enrollments paid after February 1, 2014, but before February 28, 2014 (end of open enrollment), will be subject to the full TrustGuard™ fee of \$600.00.

TrustGuard™ Enrollment Forms for the 2014 program year will be mailed to **EXISTING** TrustGuard™ 2013 active participants, as well as to JGB clients who created a Trust-based estate plan in 2014, in the beginning of December of this year. Any other JGB clients who would like to enroll in TrustGuard™ should contact JGB to acquire a TrustGuard™ Enrollment Form for the 2014 program year.

From all of us at JGB, thank you for helping us achieve the successes the firm has experienced in 2013 and we look forward to serving you in the New Year! We wish you and your families a happy and safe holiday season.



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About the Author:

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

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