



YOU DESERVE THANKS



Appreciation is a wonderful thing.

—Voltaire

Our law firm is approaching its 20th anniversary. There is a natural tendency to delay saying thank you until the actual date, but that would assume that tomorrow always comes. As there are no guarantees of tomorrow, and with an eye on the next 20 years, we think it is a good idea to offer a sincere thanks to all of those that have allowed this firm to exist and flourish.

Almost 20 years ago, a friend and trusted financial advisor urged one attorney to open a small law firm. She promised encouragement and a fair number of referrals. She delivered on those promises. We owe a debt to her for the push start that created this firm. The goal was to build a firm unlike many others - one that employed intelligent, nice folks and de-emphasized the annoying billable hour, with gratitude and appreciation for its clients. (Abe Lincoln did not bill by the hour, so we have some good company in that regard.)

We also owe a hearty thanks to those many clients and their families who have hired us to act as their lawyers and counselors. More people than you might imagine rely on our advice that is seemingly non-legal in nature. They number in the hundreds and perhaps thousands. We have planned for their combined billions of dollars (that used to be a big number) and, far more importantly, for their families and dreams.

We owe a tremendous debt to the attorneys that have worked here for those same people and their families. They have worked tirelessly and sometimes have not been shown the appreciation they deserve. Their ideas and refinements to strategies have proven invaluable to you. Occasionally, a new client asks if we charge by a percentage of the tax savings we create; if that were true, this newsletter would have been written from a distant beach.

The quietest folks here, the secretaries and paralegals, often bear the brunt of the burden. They get your work done on time, (grateful that you like to travel as that generates more work than any tax act) staying late and retaining their good attitudes. Do you know of another firm where the office manager greets guests with a smile, handshake, and an occasional hug?

Many people ask from whence all our wonderful clients have originated. The best answer is we do not know. Trusted advisors, parents, siblings, children, professionals, trustees, you name it. (While we cannot recall one client being generated by the internet, that may someday change.) We are intensely appreciative of those individuals who entrust their clients to us.

We also appreciate that there are those that make tremendous sacrifices to keep this country free. An exchange student recently remarked with surprise that American television programming is allowed to be critical of politicians and government - she had never seen such a thing and was astonished by what we too often take for granted.

We acknowledge that many contact us, at least initially, to avoid estate taxes imposed by state and federal governments. While the merits of the estate tax can be debated, we also have to appreciate a government that allows its citizens to plan their affairs to make those taxes somewhat voluntary. Those clients learn that taxes are usually the least of their concern and that protecting their loved ones from a dangerous world is the primary motivator.

For all that, this firm gives its humble thanks.



TOPGUN Instructor Commander Mike Bussman USN (ret.), SEAL Team One Leader Captain Steve Fitzgerald, USN (ret.), and Robert Napier attend career day at Cristo Rey high school in Chicago. The students were especially fascinated by estate planning tales and think lawyers are really cool.