

May, 2017

**“At our Firm,  
Your Estate Plan  
is Not Business,  
it’s a Personal...”**



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*“Success is simple. Do what’s right, the right way, at the right time.”  
– Arnold H. Glasgow*

## THE TRUTH ABOUT SUCCESS

Ever watched those shows with these ladies living perfect lives, driving the fanciest cars, eating the best meals, being spoiled by their perfect spouse? I can’t stand them 😊. The notion of success as portrayed by the media is a rather difficult standard to reach. But come to think of it, it is one I don’t believe we should aspire to in the long run.

There was a time when the notion of ‘forever young’ actually appealed to me. But you know what, those wrinkles by my eyes are starting to grow on me... The brown spots are an entirely different subject, but you get the point!

If you’ve been with me, you know how much I can’t help talking about my kids, right? Well, those little brats have been extra hyper lately, and staying up several nights in a row. Child Protective Services could come into my office if I shared what I was actually thinking, but let’s just say; it wasn’t all roses!

Here is the reality – we all lead busy lives. Actually, we all appear to live impossibly rushed lives. That strive for balance never seems to come, even when you’re just some 5 e-mails away from having a clear inbox. Those extra 5 lbs. (or more for some of us 😊) just don’t seem to want to leave our body. Let’s not get started on that Savings Account... There has got to be a few more zeros behind that number, no?

Well, maybe for some of us that happens, and others will just take longer. But that ever so popular cliché that “it is the journey that counts” really has substance behind it. See, it is in a very strange moment of reflection that I sometimes realize that it is the grind that becomes the enjoyable part of the adventure. It is that moment in time when you are so focused on drafting the last clauses of that Trust which brings you an awareness that is a little... magical. What about that intense run late in the evening when there is no one around but your thoughts, and somehow, for that moment, life just seems to be in perfect harmony.

When you can reach that moment of gratitude regularly, it is true, the goal becomes practically irrelevant. It is just being so present in that moment in time that makes things just right.

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## SPECIAL ANNOUNCEMENT

This month marks the second quarter of 2017. How are you doing so far? Did you start a new business? Did you have a chance to implement solid marketing strategies to bring in customers? You may be wondering why we are asking you such questions. Well, this month we are going to review “Traction: Get a Grip on Your Business” – this book discusses important points on how we can have better control and better results for our business(es). It is too common for start-up companies to have the most driven entrepreneurs have their businesses overrun their personal life. This should hopefully shed some light on how to prevent that from happening.

And then, we’re also going to talk about ways on how to become a transformational leader to eventually help you establish a better business and a better team to work with, so you can achieve your goals, mission and vision for the organization. Being the visionary does not translate to you having to do it all!

Lastly, we’ll discuss what Earth Day and what its significance is.

If you need help from the Asset Protection Center, feel free reaching out to us at 714-966-2646, especially on matters having to do with estate planning and asset protection that we all need before any trouble arises in our business. There is a new President, the economy is changing, and the world has never seen such fast moving changes taking place in many sectors of our economy. However, economical and legal sense is a smart move, no matter the changes. Contact us today, we can help! 😊

# CHALLENGING YOUR PROPERTY TAX ASSESSMENT

While in the midst of unprecedented times, the U.S. economy is changing landscape. Despite numerous economic experts' predictions, the stocks have never recorded such high numbers. Despite the fear of another real estate bubble, after all, we are reaching numbers equal to those of 2008 - the market remains steady. Right judgment call but just wrong timing prediction? Maybe. However, for the 'average' citizen, these are factors way outside our control.

With tax planning options often associated with the affluent of our society, what is a simple step you could undertake to save some money? How about looking at your property tax reassessment. These often go unchallenged by most American families. After all, the majority treat this assessment as a bill, and few ever take the time or energy to question it. Therein lies the mistake.

Do not get me wrong – challenging the assessment is no easy task. However, due to the pressure of these government bureaus to keep revenue stream increase, human error is far from the realm of possibilities. After all, being a resident of your county, who would have a better pulse of your actual market and neighborhood than yourself?

The first recommended line of action would be to compare the new assessed value with that of the fair market value. You can easily do so by going on to various real estate sites, getting an independent appraiser for your own records.

Another very useful tip would be to challenge it within the year of re-assessment. After all, if you decided to go at it years later, you would be facing an uphill battle. Requesting a reimbursement for years of over-payment to a government that is depleted of funds is not a good approach.

Lastly, a well prepared, research market value is of incredible benefit. Simply put, if you are to show up to an appeal with your homework prepared, the justification behind your reasoning and numbers to justify your position; there is not much of an argument that can be made against that. If the assessed value is brought down, moving forward, this would be the new evaluation which would be measured against for purposes of increasing the tax once again.

Though economical times are tough for everybody, take comfort in the fact that staying proactive in your personal finances can only be of benefit. Not only would you increase your likelihood of decreasing your personal overhead, it will teach you to become analytical in the process.

That is your tip for the month. Knowing that for most of us, April is a difficult time because the payment of taxes always seem to be higher than expected, know that you do not have to be passive in the process. On the bright side, paying more taxes most likely means that your business has grown from the year prior, hence your work work paid off.

Staying ahead of the curve when it comes to your legal and financial knowledge can pay large dividends over time. Don't hesitate to reach out to us for endless free information: [www.assetprotectioncenter.com](http://www.assetprotectioncenter.com)

## Book Review

### TRACTION: GET A GRIP ON YOUR BUSINESS / GINO WICKMAN

A few issues that medium-sized business owners are facing are lack of control over their time, their company and their market. As a result, many of them are facing frustration in relation to their partners, vendors, customers and employees. Others suffer from insufficient profit or slow growth no matter what they do.

In the book “Traction: Get A Grip On Your Business”, Author Gino Wickman describes how you can achieve better balance, better control and better results for more fun and more business income.

While some of the principles shared are not new, the integration of these techniques and practices into a holistic system for operating a businesses provides an excellent blueprint. Wickman also adds an innovative and systematic guide and framework essential for a business to succeed.

As in all businesses, great concepts mean nothing without proper execution. This is where Wickman created a simple six-step formula that provides you a step-by-step approach you can undertake in and bring order into a chaotic business environment. With over 2,000 companies trained under his system, the old excuse “... but my business is different” will not apply.

Summing up, the book clearly describes that successful businesses are operating with a specific vision, which has to be shared by everyone on the team. That is why it is integral that you have the right people in the right position. And in his “manual” book, the author provides an insightful guide and framework, which are equally concise and practical. He illustrates “the why, the what and the how” – completely. There isn’t much more you can ask from a business book. This is a very easy read, and its useful components would well make it worth your time.

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For myself, establishing goals is a way of life, and one I don’t intend to change. However, the pursuit of the end result is no longer the absolute measuring component. The awareness of being present, this is something we should all contemplate and dive in a bit deeper. Who knows, you might surprise yourself and realize that achieving the final outcome suddenly becomes easier than ever before.

As these little brats were resisting me, one running and one crawling around the house refusing to go to sleep; I gave in. Yep, I let them have their way. We actually began to draw and laugh a bit later than I would have liked. I confess, I didn’t return that e-mail on time. And you know what, as I kissed them both trying to put them to sleep, somewhere along the line; I had fallen asleep. I woke up in the middle of the night, slowly found my way to bed, and had this moment of realization... This is what success feels like 😊

## Business / Health / Wealth

### EASY AND SIMPLE WAYS ON HOW TO BECOME A TRANSFORMATIONAL LEADER

In one form or another, we are all leaders – whether we know that we have that leadership in us consciously or not. We’re continually leading others as well as ourselves. Thus, we really don’t have to lead an entire team or office for us to be called leader.

But there are ways on how we can hone such leadership skills, which will prove useful no matter the industry in which we belong.

According to experts, a few significant leadership skills include adaptability, assertiveness, conscientiousness and intelligence. But then, studies also reveal that qualities that are more important are those of transformational leaders, who lead others by inspiration, example and empowerment.

Thus, people that take notice can develop not only themselves but also their followers – transforming them into better leaders. In return, their followers value them, so they perform well.

So if you want to become a better leader, it would be wise to lean towards becoming that transformational leader, the one who not only enhances his leadership skills, but someone who also tries to get the most out of everyone in their team as well. By creating a selfless environment, whereby not only performance is taken into account, but rather the holistic well-being of the person, a team can create transformational changes.

To attain such lofty aspirations, one should have a clear vision – along with your goals and mission. Provide a clear path for your team to follow. In the process, the people in your sphere will get a better understanding of your goals – and ways those are valuable for them.

For the best results, meet your team and include them in strategic planning sessions, while not forgetting to ask for their feedback and getting them to buy into those visions you have for the organization.

Most importantly, set an example “walk the walk and talk the talk” so that you can encourage your teammates to follow and apply the same qualities.

Be the most admirable leader by emulating positive behaviors that are worth the follow. Soon enough, developing your leadership skills will come naturally and qualities you’d like to see in your people will come next.



## *What's Earth Day?*

Well, daylight savings time is once again upon us... Thank goodness! We for sure appreciate winters at the office, but we'd be lying if we didn't say that the sun has a way of making things ay-ight! If you were wise, and our guess is you must be because you are subscribed to our Newsletter, then tax filing and payment is well behind you. If not, you still have a few more days, but don't push your luck!

Now that your financial affairs will be handled for the year, stay vigilant and continue being smart with your money for 2017. If you are not incorporated, call us! Waiting for tax season to end so you can do that estate plan you've been meaning to do? Call us! Any fear of lawsuits you've been dealing with on the horizon? You know what to do!

Be it as it may, let us see softer weather come upon us in the coming months. Though some 192 countries have celebrated Earth Day on March 21st, the United Nations declared the International Mother Earth Day to be April 22nd. Where will you be taking your family to celebrate this beautiful occasion? No marketing, no consumer products, just a simple reminder to be grateful for this beautiful place called Earth we live on.

As always, we remain available to service your family and your business, feel free to call us for any legal needs – 714-966-2646

Happy Earth Day from your friends at the Asset Protection Center!