

IN THIS *issue*

- 01 | Isn't It Time You Invested In You And Your Practice? Join Us at TAPER Syracuse
- 02 | Recent Changes To The VA Pension Program Rules
- 03 | Member Of The Month - Esther Acosta
- 04 | Join Us For Cocktails, Dinner, Interactive Comedy, Intrigue—and Maybe, Murder

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Isn't It Time You Invested In You And Your Practice? Join Us At TAPER Syracuse

Phil Miner

Spend time with fellow members networking and seeing what others are doing that's working and sharing what you've found is working, in order to help others in our LWP community.

We have an exciting agenda with new presenters. And, we have Dave Zumpano presenting live on how each iPug Trust is a stand-alone IRA Trust. Get that jolt of excitement and encouragement that a live LWP program can provide. Get a plan with actions that will help you reach your next plateau of goals. Focus on what your KPIs are indicating, and make sure you are getting the value you deserve.

Are you...

- Struggling with team issues and want more unity and teamwork?
- Are you struggling hiring the right person or knowing when to hire or fire a team member?
- Do you simply want more tools in your tool box to utilize the iPug trust and have more higher-end plans?

- Is trust administration a service you offer, but not as profitably as you'd like?
- Do you want a clear step-by-step plan on how you are going to get to the next revenue goal or meet your revenue goal consistently?

These are just a few of the issues you will receive support on at TAPER!

I love coaching our members, helping them overcome the challenges and obstacles. I enjoy seeing their success when they have a clear focus on what to do, and I want to connect with as many members as I can. You will be hearing from Amanda Ross and me in the near future. Please be sure to let your office know that when we call, you'd like to take the call or have them schedule a convenient time.



Isn't It Time You Invested In You And Your Practice? Join Us At TAPER Syracuse (Cont.)

As the Member Success Coordinator of LWP, I want to hear what you feel you need from us, and I want to ensure we are doing everything we can to help you succeed.

TAPER is about you, and your success, whatever that means to you! I want this event to be a great learning experience not only from our presenters, but from conversations that will occur outside the room. I'm encouraging all members to ask themselves and determine that yes, now is the time to be in the room to get a taste of the live experience again, and to be there for one another.

Let's make this the TAPER where we all get back to our roots in LWP, build each other up, and share our successes. If you have challenges come join us at TAPER and we'll help you. Reach out to schedule a call if you are not sure how TAPER can help. I'll be happy to chat with you.

Don't let any excuse stop you from being at this event; you will miss out. I hope to see you in Syracuse!

Thank You and Many Blessings,

Phil Miner



Recent Changes To The VA Pension Program Rules

MAJ (R) Matthew W. Donald, ESQ

On January 23, 2015, the VA proposed a change to the rule which governs the VA pension program. A 60-day public comment period for the proposed rule ended on March 24, 2015 and resulted in over 850 comments from the public and Congress. Since that time the rule has been placed in a state of "limbo" and was pending review by the new administration.

On September 14, 2018, the Trump administration concluded its review of the VA's proposed rule change to RIN 2900-AO73 - Net Worth, Asset Transfers, and Income Exclusions for Needs-Based Benefits. On September 18, 2018, the final rule was published and resulted in several changes from the original proposed rule change. This rule becomes effective on October 18, 2018. Any transfers prior to that date are not impacted by this new rule.

The rule change covered several broad areas including:

1. Changes to the pension benefit program with respect to the amount of net worth a claimant could have to qualify for pension
2. The manner in which the VA calculates a claimant's assets – specifically regarding the home and income
3. Establishment of a 36-month "look-back" period and a penalty period not to exceed 10 years (5 years in the final rule) for those who transfer assets during this look-back period to qualify for pension
4. Defining and identifying medical expenses that VA may deduct from countable income for its needs-based benefits that utilize such deductions – specifically IADLs vs. ADLs, and cost of care for home health aides

LWP will continue to analyze these VA changes and provide our valued members with additional training and resources.

Lawyers With Purpose would like to recognize **Esther Acosta** as **AUGUST 2018** *Member of the Month*

What is the greatest success you've had since joining LWP?

I was keen to succeed from the outset! LWP has helped turn my vision into reality and conquer my fear of STARTING MY OWN LAW PRACTICE. The LWP platform prevented me from wasting my time and misallocating my resources, while delivering all the necessary tools for success.



How has being part of LWP impacted your team and your practice?

Conducting a team meeting each week to review everyone's personal and professional progress has been a key element within our team. We take the time to listen to each other; approach problems with enthusiasm, not defeat; invite conversation; hire the right person for the job (KOLBE); and clarify expectations while offering guidance and direction when needed.

It is like having butterflies before the game. Once you get started, the fear will begin to dissipate. Undoubtedly, other fears may arise as you face new challenges. Nevertheless, LWP helped me rise above my challenges through their affirmations with consistent legal and implementation coaching; a valuable resource that gives me the reassurance I need to succeed.

I started with one employee. Just by following the LWP process, I grew my firm to four employees in eight months.

What is your favorite LWP tool?

The marketing platform. It's like an orchestra conductor, maintaining harmony with different moving parts. LWP provides a great platform that helped me sidestep cacophony and stand in as a virtuoso conductor, unifying the marketing into a lyrical masterpiece that can truly captivate its audience.

The core system is purpose-built to adapt to new channels and opportunities.

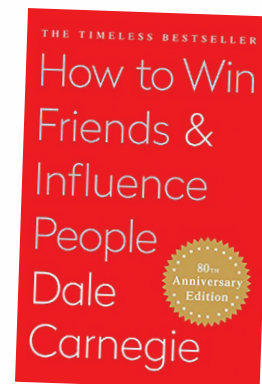
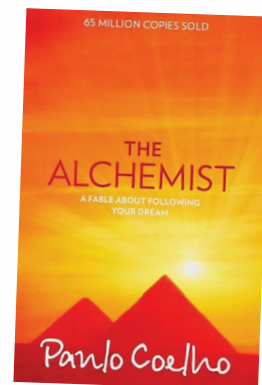
It helped better organize important points of interaction (networking) and orchestrate my personal story across channels with the ultimate goal of helping others.

Share something about yourself that most people don't know about you.

I enjoy making people smile with random acts of kindness. I have the ability to laugh at myself and I enjoy listening to inspiring podcasts. I try to practice principles of Dale Carnegie.

What is your favorite book and how did it impact your life?

1. *The Alchemist* by Paulo Coelho. Love the quote, "And, when you want something, all the universe conspires in helping you to achieve it." This book is an allegory, layered with many intricate concepts and universal principals that have existed since the dawn of civilization, such as, "Perfection is illusion, don't wait for it," and "Fear is a bigger obstacle than the obstacle itself."
2. *How to Win Friends and Influence People* by Dale Carnegie. This changed my life by improving the way I interact with, and make an impact on, people.



Congratulations to you on your continued success!

JOIN US FOR

Cocktails, Dinner, Interactive Comedy, Intrigue— and *Maybe, Murder*



We've cooked up something very special for **Thursday night at TAPER Syracuse in October—a hilarious Who Done It, "Deadly Inheritance"** starring professional actors with LWP members deciphering clues to solve the mystery. To wit:

The Matriarch of a wealthy family is gravely ill and wishes to settle her estate. First, her long lost younger son must be declared officially dead. Join the Matriarch's greedy relatives in memorializing "Little Dickie" and battling for the lion's share of the \$13 billion estate. **But beware: The next memorial could be for you or one of your colleagues.**

It's going to be a night of mystery, laughter, and comradery... a night to die for.

Please RSVP by October 1st. The cost of \$44 per person covers cocktail hour, a three course dinner and the evening's entertainment.

Cocktail hour begins at 6PM, October 18th, in the stunning hotel lobby. After that, anything goes. All we can tell you is you're going to have a great time! (This is a mystery, after all.)

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TAPER

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