

February 2007

### ***Professional Announcements***

In the spirit of continual improvement and better service, we are honored and excited to make the following announcements:

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#### ***Growing in Excellence - Partners***

In January 2007, **Attorneys Daniel A. Guglielmo and Ronald B. Ware**, of the law firm of Guglielmo and Ware, LLP of Franklin, Massachusetts, joined with us to form ***Borchers Ware & Guglielmo, P.C.***

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#### ***Growing in Excellence - Associates***

**Atty. Robert A. Fatini** has joined us to head up our real estate and estate administration practice. He comes with several years of experience in hundreds of closings, titles, and significant trial work.

**Atty. Ryan J. Swartz** joined our estate planning department last month and is an authority in Elder Law/Medicaid Planning.

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#### ***Growing in Relationships***

Our new partners, Dan and Ron, are also the owners of **TrustDesign, a family wealth advisory firm with a proprietary financial planning process developed over a period of twenty years.**

(Please read more in the following pages!)

## ***NEW PARTNERSHIP ▪ NEW ASSOCIATES ▪ NEW AFFILIATIONS***

In the spirit of continual improvement, constructive growth and better service, we are honored and excited to make the following announcements that will significantly improve our resources and our ability to deliver service excellence to you, our valuable clients and friends.

### ***Growing in Excellence***

*- Partners*

In January 2007, Attorneys **Daniel A. Guglielmo**<sup>i</sup> and **Ronald B. Ware**<sup>ii</sup>, of the law firm of Guglielmo and Ware, LLP of Franklin, Massachusetts, joined with us to form ***Borchers Ware & Guglielmo, P.C.***

Tim, Dan and Ron were drawn together one year ago by their common leadership in the legal and financial communities. Very quickly, however, they envisioned forming a partnership melding their knowledge and practice of law into a new association, the one that we are so very proud and happy to announce to you at this time.

Dan and Ron are highly regarded tax, estate planning and family wealth advisors, well known in the region and nationally. Recently, our new partners were honored to join the **Donor Motivation Group**, which is a select group of advisors from around the nation advising nonprofit organizations and donors in creating social capital through charitable gift planning. Dan and Ron are also founders of **The Exit Planning Exchange**, an interdisciplinary group of professional advisors and business consultants committed to helping business owners think more strategically about their business and their future. In 2006, Tim Borchers and the firm joined **WealthCounsel**, a national association of advanced estate planning attorneys, of which Dan and Ron are founding members.

Borchers Law Group made the decision to expand the firm by the addition of partners after carefully considering how to address these important realities:

- Our history of **top-shelf legal advice and legal drafting** could be enhanced if supported by **comprehensive financial analysis and planning platforms**;
- **Planning for the care of client's wealth**, as much as for their loved ones, has become a major concern of our clients that we need to address as a law firm; and
- Growth of our firm would be encouraged by the addition of **partners who will bring relationships that will benefit our clients** in our core areas of expertise, especially estate planning, and to add to the collective brainpower of the firm.

Joining with Dan and Ron was an obvious means to meet these realities: They have developed significant tools and systems of financial analysis, and they bring far-reaching professional relationships and a large body of legal clients. With core values consistent with our own, Ron and Dan were the solution to Tim's long-time search for partners.

## **Growing in *Excellence***

- *Associates*

We have always been proud of our professional staff, past and present. It gives us enormous pleasure now to introduce you to our newest associates in estate planning, real estate law and tax.

Atty. **Robert A. Fatini** has joined us to head up our **real estate and estate administration practice**. He comes with several years of experience in hundreds of closings, titles, and significant trial work. While working full time with the firm, Rob is also earning an advanced law degree in the nationally renown tax law program at Boston University. Hard working and driven to expand our real estate practice, Rob will be a “shot in the arm” for this team. His knowledge of the tax code on top of our extensive practical application of tax law, and his extensive law office administration experience, supports our theme of *Growing in Excellence*. We see a distinguished career ahead for this lawyer.

**Atty. Ryan J. Swartz** joined our estate planning department last month and is a young authority in **Elder Law/Medicaid Planning**. Following graduation with honors from Suffolk University Law School, a judicial clerkship and firm experience, Ryan joined us to deepen our **estate planning practice**. Chosen for his leadership potential and drive, it is our prediction that Ryan will rise to the top of the estate planning field in time. Ryan has a natural way with people and a desire to learn and excel that impress us as he emerges as an estate plan draftsman and a leader in the firm.

**Both Rob and Ryan share the vision of the firm as preeminent in the profession.** They understand and value our promise to *listen deeply, advise resourcefully and advocate passionately for our clients*.

## **Growing in *Relationships***

- TrustDesign

Our new partners, Dan and Ron, are also the owners of TrustDesign, a **family wealth advisory firm with a proprietary financial planning process developed over a period of twenty years**. TrustDesign's *Family Wealth Pathway*<sup>™</sup> process provides their clients the information and analysis they need to continually make confident decisions about their future. TrustDesign has a rich history working with business owners, senior executives, high-income professionals and retirees. In addition to its comprehensive planning services, TrustDesign provides best-in-class investment management and life insurance advisory services.

As you know, our firm has always been dedicated to the financial-related areas of the law. As many of you also know, **we are driven to honor the purposes and missions of our clients, especially when it comes to the care of family and the stewardship of assets.** With our new affiliation with TrustDesign, we are adding significant resources to enable us to do so.

-- For those of our clients with unfinished or unmet financial planning issues, **TrustDesign** may be an excellent resource for you.

-- For those clients who are introduced to us by **TrustDesign**, you can rest assured that we will honor and support that relationship.

-- For other clients still, who may have existing, productive advisor relationships, we will respect those relationships. We believe that our capacity for more comprehensive analysis and planning will assist in making those relationships even more productive.

**- Tim's personal note:**

As with all changes, we understand that these announcements run the risk of confusing you. **As managing partner of this firm and, for many of you, your personal attorney, please know that my role for you is not going to diminish.** I value you more than ever and only want to augment our level of service and dedication to you, your families and your businesses. Please call me directly with any questions or concerns you may have. Let me assure you, however, that we have entered into these relationships only after investing significant time and energy to be sure that these new affiliations will add to our service offering to you.

We hope that you share our excitement as we continue together down the pathway to a bright and prosperous future for all of us!

Sincerely,

*Tim Borchers*

Borchers Ware & Guglielmo, P.C.

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<sup>i</sup> Daniel Guglielmo is a 1979 graduate of Colorado College and a 1984 graduate of Arizona State University School of Law.

<sup>ii</sup> Ronald Ware is a 1990 graduate of Bryant College and a 1996 graduate of Regent University School of Law.