

# Client Care Program

Virtual or in-person one hour meeting to review your existing Estate Plan approximately every three (3) years to determine whether your goals are still aligned with your plan and your assets are properly owned (titled) and/or have appropriate beneficiaries named.

Access to our highly trained estate planning team of attorneys, paralegals, and legal assistants for advice regarding your Estate Plan and its maintenance. Calls or emails responded to within one business day.

Updating your Estate Plan (Trust, Will, POAs) documents to reflect a change in your decision makers or to amend existing Articles within your plan.

Virtual or in-person one hour meeting with your successor trustee to explain the structure of your Estate Plan, identify roles and responsibilities, and answer questions or concerns related to your plan.

Exclusive access to our digital Successor Trustee Manual at the first annual renewal of your membership.

Discuss legal questions such as small business matters and real estate for referral without charge.

Access 24/7/365 to your private, secure web portal where digital copies of your legal documents are stored.

Prepare Health Care documents at no charge for your children as they turn 18.

Invitation to our annual virtual estate law update.



**\$250 billed annually**