Annual Client Care Program

Compare Regular Client Support vs Annual Client Care Program Benefits

All Clients are Entitled to the Following Benefits:

- Review with a Paralegal – Clients may request a periodic meeting with a paralegal to discuss changes to the Trustee and Distribution provisions. Some changes may require an attorney meeting billed at the hourly rate of $250.
- Free Phone Calls with staff and paralegals – we offer free phone calls regarding any question you have about the estate plan we drafted for you. Attorney phone calls are billed at the hourly rate of $250.
- Free meeting with Successor Trustee(s) in the event of your death or incapacity (60-minute meeting). Additional services are additional.

Additional Benefits Under the Annual Client Care Program:

- **All of the above "regular client benefits" plus:**
- Access to our new, exclusive Client Care Website, where we have posted all past quarterly seminars and blogs on current events.
- Client Care Program Concierge. When you want to make one call 'to have it taken care of' call the Concierge.
- Free phone calls, e-mails or letters with an attorney regarding predetermined attorney level questions.
- Annual "confirmation letter" verifying the terms of your estate plan. **This letter will also inform you of recent changes in the law which may affect your plan.**
- **Free Amendments** to Estate Plan to change:
  - ✓ Beneficiary Names and Percentages
  - ✓ Agents on Healthcare Power of Attorney and Property Power of Attorney
  - ✓ Executors, Trustees or Guardians
- 15% Discount on legal fees for revisions outside of those listed above.
- 10% Discount on legal fees for your trust/ estate administration.
- Free Asset Detail Report. This report will help you verify the title of your assets and monitor the value of your estate. When up to date, this Report will help your Successor Trustee in locating assets and spotting issues related to administering your Trust.
- Special Quarterly Seminars with special guest speakers. 2019 topics include:
  - ✓ Sr. Property Tax Exemption
  - ✓ Wine Sip & Learn
  - ✓ Alzheimer's / Care Giver Support
  - ✓ Income Tax Planning
- DVD or Web Download of ALL quarterly seminars – those you attend or are unable to attend. Past Seminars available for immediate download include:
  - ✓ Funeral Planning – How to Save Money and Reduce Stress
  - ✓ Ethical Wills and Legacy Letters
  - ✓ Inherited IRA Planning
  - ✓ Medicaid Planning
  - ✓ Social Security Benefits
  - ✓ Identify Theft, etc.
- Free Successor Trustee Manual upon 1st Annual Renewal of Membership.
- Free update of your Durable Powers of Attorney every other year upon renewal.
- Free Washington or Idaho Advance Health Care Directive (Living Will) for your immediate family members (parents, siblings, and adult children).
- 24 Hour Access to your healthcare documents through Legal Directives. The Emergency Card provides immediate access to your healthcare documents – anytime and anywhere they are needed.
- A digital storage lock box to store your estate plan and other important documents. No more need to carry your Living Trust Binder when you Travel.
- Free Notary Services for any legal document.
- Exclusive Monthly Newsletter.
- The Cost is: Married $375.00 per year
Single $275.00 per year