

**HERE'S THE SECRET TO STAYING CURRENT:
OUR FAMILY WEALTH VIP MEMBERSHIP PLAN**

BENEFITS	Value	Silver Members	Gold Members	Platinum Members
1. Annual Estate Plan Review	\$500	YES	YES	YES
2. Unlimited Plan Amendments Due To “Word Processing” Or Law Changes, And Due To New Ideas We Learn And Want To Pass On To You So Your Estate Plan Works When You Need It Most!	\$250 To \$1000s	YES	YES	YES
3. Free Updated DPOA And HIPAA Release Every 3 Years.	\$500*	YES	YES	YES
4. Free Health Care Proxy For Your Single Children Up To Age 25.	\$200*	YES	YES	YES
5. Free DPOA For Your Single Children Under Age Up To Age 25.	\$200*	YES	YES	YES
6. Bonus Benefit Your Own: Preferred Provider Network With Great Discounts!	Varies	YES	YES	YES
7. 10 % To 50% Discount On Future Legal Needs. If It Is A Legal Matter We Can Help With, We’ll Do So At 10% To 50% Off Our Regular Fees.	Varies	YES	YES	YES
8. Call Your Personal Family Lawyer Before Making Any Legal Of Financial Decisions. 15 Minute Phone Consult At No Charge. If it isn’t something we handle, then we will get you a referral to someone we trust. Up To 5 “Lawyer Letters” Written On Your Behalf.	\$1000s		YES	YES
9. Free Docubank Document Storage And Wallet Card For 24/7 Access To Your Health Care Documents Anywhere.	\$100*		YES	YES

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10. Bi-Annual Family Meeting To Integrate Adult Children Into Planning And Prepare Them To Receive Wealth So Your Family Increases Its Wealth At Each Generation. Protect Against The Rags To Riches To Rags Phenomena.	\$950		YES	YES
11. Annual Priceless Conversation To Capture Your Most Important And Most Frequently Lost Family Wealth – Who You Are And What Is Important To You.	\$250*			YES
12. Monthly Family Wealth Matters Audio CDs Mailed To Your Home That Contains Interview With Experts Who Will Increase Your Family Wealth Health And Happiness.	\$50			YES
13. Free Preparation Of MA Deeds Required To Fund Your Trust With New Property.	\$350* *			YES
14. Annual Opportunity Capturing Meeting With Your Personal Family Lawyer And Your Tax Advisor And/Or Your Financial Advisor (You Choose Who To Include)	\$1,000			YES
15. Maintenance Of Irrevocable Life Insurance Trust And Recordkeeping Of All Gifts Into Trust So Your Insurance Is Not Subject To Estate Tax At Your Death.	\$750			YES
Monthly Membership Dues For Singles		\$14.97	\$29.97	\$44.97
Monthly Membership Dues For Couples		\$19.97	\$39.97	\$54.97
Total Annual Value		\$1650+	\$3700+	\$6100+

* Per Person ** Per deed, does not include recording costs.

This chart is for descriptive purposes only, upon sign up a more detailed document and contract will be reviewed with the client.