

CONTINUOUS COMMITMENT



Included in your Membership:

- ✓ Phone calls, emails, copies, etc.
- ✓ Questions answered
- ✓ “Word Processing” amendments
- ✓ Annual Asset Review Report
- ✓ Annual Estate Planning Review Worksheet

Group Estate Plan Updates:

- ✓ Annual Client Meeting (ACM)
- ✓ Client Update Program (CUP)

Continuing Education:

- ✓ LifeFocus Planning educational programs
- ✓ Nuts ‘n Bolts
- ✓ Successor Trustee training courses

DocuBank® Membership

- ✓ 24/7/365 access to Advance Directives

Directive Communication Systems (DCS)®

- ✓ Digital asset management

Personalized Plan Assistance

- ✓ Personal Property (Special Stuff) Memorandum
- ✓ Healthcare Letter of Instruction
- ✓ Final Arrangement Instructions
- ✓ Final Family Letter

Communicating and coordinating with your Advisors & Helpers

