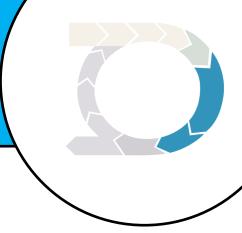
CONTINUOUS COMMITMENT



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



