




# Legacy Support Program

 <p>FOUNDATION</p>	 <p>ARCHITECT</p>	 <p>FORTRESS</p>
<p><i>A foundation for maintaining estate planning essentials.</i></p>	<p><i>A blueprint for your evolving legacy, providing enhanced support and strategic adjustments.</i></p>	<p><i>Proactive strategic guidance with hands-on support. We help you safeguard a lasting legacy while you build.</i></p>
<ul style="list-style-type: none"> <li>• Storage and immediate access to your estate planning documents on our <b>client care digital app</b> (includes emergency response information)</li> <li>• Ongoing <b>email support</b> regarding funding questions with paralegal</li> <li>• <b>Family Wealth Inventory</b> (FWI) or 1 annual update to FWI</li> <li>• Notary Services</li> <li>• 10% off all other non-litigation legal services</li> <li>• Access to our firm referral sources</li> </ul>	<p>All Foundation Plan PLUS:</p> <ul style="list-style-type: none"> <li>• <b>1 status call</b> per year with an attorney to discuss funding or other questions</li> <li>• Up to <b>1 fiduciary change</b> in 1 document (PR, Trustee, POA, Health Agent, or Guardian)</li> <li>• Up to 1 update for <b>Protection Plan for Minors</b> documents</li> </ul>	<p>All Architect Plan PLUS:</p> <ul style="list-style-type: none"> <li>• Unlimited updates to FWI</li> <li>• Up to 3 <b>deeds</b> prepared to trust or LLC (does not include recording fees) (\$1125 value)</li> <li>• Up to 5 <b>business funding</b> documents (\$1000 value)</li> <li>• <b>Ongoing coordination</b> with your financial, accounting, and insurance professionals</li> <li>• Annual update to legacy interview or <b>meeting</b> with trustee or family</li> <li>• Includes up to 2 <b>fiduciary changes</b> in up to 2 documents (PR, Trustee, POA, Health Agent, or Guardian)</li> <li>• Up to <b>2 status calls</b> per year with an attorney to discuss funding or other questions</li> </ul>
<p><b>\$59/month (one year commitment) or \$600/year (paid in full)</b></p>	<p><b>\$99/month (one year commitment) or \$1000/year (paid in full) or</b></p>	<p><b>\$289/month (one year commitment) or \$3000/year (paid in full)</b></p>

\*We encourage ongoing maintenance and a continued relationship with our firm. If you enroll in the maintenance plan more than 90 days after your funding call, a \$150 Catch-Up Fee will apply to cover the additional time needed to review your plan and ensure everything remains properly aligned with your goals and circumstances.