

Events That May Require Revising Your Estate Plan

Family Changes

- Birth or Adoption of a Child
- Marriage or Divorce
- Family Members with new Special Needs

Wealth Changes

- Buy/Sell Real Estate
- Large Inheritance
- Job Change
- New or Expiring Life Insurance

Tax Law Changes

New Estate Strategies

Chester County

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LEGACY ANNUAL MAINTENANCE PROGRAM

In order to ensure that your estate plan remains most effective, we recommend that each client join our **Legacy Annual Maintenance Program (L.A.M.P.)**. As time passes, even excellent estate plans may need to be updated for various reasons, including: changes in family circumstances, changes in family wealth, changes in estate/tax laws, and changes in modern estate planning strategies. We offer three levels of membership. First, our **Review Membership**, ensures that your attorney automatically annually reviews your estate plan. **Access Membership** is designed to provide each client with an annual review, plus, no fee access to your documents online and no fee access to your attorney. Our **Legacy Membership** further provides each client with legacy building by incorporating all interested fiduciaries/beneficiaries in the estate planning process.

	Review*	Access	Legacy
Attorney Access & Annual Review			
Annual Review and Questionnaire Update	✓	✓	✓
Annual Meeting to Review Existing Plan	✓	✓	✓
No Fee Phone Client Calls to Attorney		✓	✓
Emergency Access to Attorney via Cell Phone		✓	✓
Secure Document Storage			
Secure Storage of Original Documents At Firm	✓	✓	✓
Secure Online Access to PDFs of Documents		✓	✓
Wallet Card For Instant Doctor Access to Docs		✓	✓
Discounted Legal Fees			
Nominal Fees for Minor Changes to Existing Plan	✓	✓	✓
25% Discount on Major Changes to Existing Plan		✓	✓
50% Discount on Future Funding Assistance		✓	✓
Estate Planning Education			
Estate Planning Newsletter		✓	✓
Invitation to Annual Members Event			✓
Legacy Planning & Family Meetings			
No Fee Will-Based Planning for Your Children			✓
In-Office Meeting for Fiduciaries/Beneficiaries			✓
Estate Plan Binders for Fiduciaries/Beneficiaries			✓
Annual Fee	\$300	\$500	\$700

* Review Membership Only Available for Will-Based Estate Plans