

2015 ESTATE PROTECTION PLAN (EPP)

Effective as of Sept 1, 2015

COMPLIMENTARY ENROLLMENT BONUSES

| Bonus | Description | Value |
|---|--|-------------------------|
| Docubank Membership | Annual membership in Docubank - provides emergency personnel and loved ones with immediate access to your health care directives and emergency medical information 24/7/365, anywhere in the world | \$45 per person/year |
| 50% Off Plan for Children or Parents | 50% off an estate plan for your parents or adult children (Florida residents) within 1 yr of enrollment | \$500-\$5,000+ per plan |
| Free Health Care Directives and Durable Power of Attorney | Free Health Care Directives and Durable Power of Attorney for your unmarried, childless children age 18-24 (Florida residents) within 1 yr of enrollment | \$250 per child |
| Free Estate Plan Review for Parents Over 65 | Free Estate Plan review for parents over age 65 with less than \$4 million in assets if married or \$2 million if single (Florida residents) within 1 yr of enrollment | \$500-\$1000 per review |

FAMILY MEMBERSHIP PLANS

| Membership Benefit | Value | Will EPP | Trust EPP | Legacy EPP |
|---|------------|---|--|--|
| | | For the family with a simple Will-based estate plan who wants: <ul style="list-style-type: none"> To have Estate Planning documents that always reflect their life, their assets, and the law To ease the burden on their loved ones when they become incapacitated or die To ensure their assets never go to the State To have access to legal guidance when they need it | For the family with a complex Trust-based estate plan without estate tax issues who wants: <ul style="list-style-type: none"> To have Estate Planning documents that always reflect their life, their assets, and the law To ease the burden on their loved ones when they become incapacitated or die To ensure their assets never go to the State To have access to legal guidance when they need it | For the individual with a complex Trust-based estate plan that may include estate tax issues and/or irrevocable life insurance trusts who wants: <ul style="list-style-type: none"> To have Estate Planning documents that always reflect their life, their assets, and the law To ease the burden on their loved ones when they become incapacitated or die To ensure their assets never go to the State To have access to legal guidance when they need it |
| Annual Plan Review and Unlimited Document Amendments Due to Life and Law Changes | \$500+/yr | Included | Included | Included |
| Unlimited Phone and Email Access to Your Lawyer and Office Team Members. Even if Your Legal Question is Not Related to Your Estate Plan, Call Us and We'll Point You in the Right Direction. | \$250+/yr | Included | Included | Included |
| 10%-50% Discount on Future Legal Needs such as Revocable Living Trusts, Special Needs Trusts, Retirement Plan Trusts, Gun Trusts, Pet Trusts, Life Insurance Trusts, Medicaid or VA Pension planning, etc. | \$1000s | Included | Included | Included |
| Docubank Annual Renewal | \$45/pp/yr | Included | Included | Included |
| Invitations to EPP Member-Only Events | \$100+/yr | Included | Included | Included |
| 50% Discount on Probate Administration Fees (subject to min fee) | \$1000s | Included | Included | Included |
| 50% Discount on Trust Administration Fees (subject to min fee) | \$1000s | Included | Included | Included |
| Preparation and Annual Updates of Your Asset Spreadsheet so Your Family Knows What to Look For When You're Not Around and None of Your Assets End Up as Part of the \$1 Billion+ of Florida's Unclaimed Property. | \$350+/yr | | Included | Included |
| Annual Assessment of Your Gifting Plan to Ensure You're Using All Possible Gifting Techniques Appropriate for Your Tax and Family Situation | \$500+/yr | | | Included |
| Maintenance of Up to 2 Irrevocable Trusts (including Crummey Letters) and recordkeeping of All Gifts Into the Trust to Ensure Your Insurance Is Not Subject to Estate Tax at Your Death (addl trusts extra) | \$500+/yr | | | Included |
| Annual Roundtable Meeting with Your Lawyer, Your Financial Advisor, and/or Your Tax Professional (you choose who to include) to review the current year, plan for the coming year, and ensure everyone is on the same page | \$750+/yr | | | Included |