

Annual Client Care Program

Compare Regular Client Support vs. Annual Client Care Program Benefits

All Clients are Entitled to the Following Benefits:

- ◆ 3 Year Review with a paralegal – We send you a notification to perform a 3 year review. It's up to you to complete and return the paperwork. Once we receive the completed paperwork, we complete a free internal review of the estate plan we drafted for you. Although you are entitled to a free meeting with a paralegal every 3 years, we do reserve the right to charge for attorney-client meetings and we do charge to make changes.
- ◆ Free Phone Calls with staff and paralegals – we offer free phone calls regarding any question you have about the estate plan we drafted for you. Attorney phone calls are billed at the hourly rate of \$200.
- ◆ Free meeting with family members in the event of your death or incapacity (60 minute meeting).

Additional Benefits Under the Annual Client Care Program*:

- ◆ All of the above “regular client benefits” plus . . .
- ◆ Free phone calls, e-mails or letters with an attorney regarding predetermined attorney level questions.
- ◆ Annual “confirmation letter” verifying the terms of your estate plan. This letter will also inform you of recent changes in the law which may affect your plan.
- ◆ Free Asset Detail Report. We monitor the value of your estate and verify the title of your assets. We also track the designation of beneficiaries of your annuities, life insurance and Qualified Retirement Plans.
- ◆ Free Notary Services for any legal document.
- ◆ Exclusive Monthly Newsletter.
- ◆ Free update of your Durable Power of Attorneys upon January annual renewal.
- ◆ Client Care Program Concierge. When you want to make one call to “have it taken care of” call the Concierge.

- ◆ Special Quarterly Seminars with special guest speakers on topics such as:
 - ✓ Funeral Planning – How to Save Money and Reduce Stress
 - ✓ Ethical Wills and Legacy Letters
 - ✓ Inherited IRA Planning
 - ✓ Income Tax Planning
 - ✓ Medicaid Planning
 - ✓ Social Security Benefits
 - ✓ Identify Theft, etc.
- ◆ DVD of ALL quarterly seminars – those you attend or are unable to attend.
- ◆ Free Amendments to Estate Plan to change:
 - ✓ Beneficiary Names and Percentages
 - ✓ Agents on Healthcare Power of Attorney and Property Power of Attorney
 - ✓ Executors, Trustees or Guardians
- ◆ 15% Discount on legal fees for revisions outside of those listed above.
- ◆ 10% Discount on legal fees for your trust/estate administration
- ◆ Free Washington or Idaho Advance Directive for Healthcare for your immediate family members (parents, siblings, and adult children).
- ◆ Free Preparation of Annual Corporate Minutes for entities prepared by Moulton Law Offices.
- ◆ 24 Hour Access to your healthcare documents through *LegalDirectives*. The Emergency Card provides immediate access to your healthcare documents – anytime and anywhere they are needed.
- ◆ Access to our new, exclusive *Client Care Website* where we have posted all past quarterly seminars. We also frequently post blogs on current events and office gossip.
- ◆ A digital lock box to store your estate plan and other important documents.

- ◆ The Cost** is: Married \$375.00 per year
Single \$275.00 per year

**We now offer a monthly payment plan with a credit card