PWW law

CARES PROGRAM

Continued Alignment, Review, Education, and Support

PWW Law CARES about you and your family. We believe that estate planning is a process and not a transaction. Continued alignment, review, education, and support is necessary to make sure your plan works when you need it to, that is upon your disability or death. As a valued client of PWW Law, we encourage you to enroll in our CARES Program, which will entitle you to the following benefits:

- *Alignment*. After the initial alignment of your assets with your estate plan, changes will inevitably occur. Keeping up with those changes is critical to the success of your plan.
  - Our team will collaborate with you and your other advisors so that we are all working together with the mutual goal of taking care of you and your family.
  - We will provide a copy of your Asset Folio to you annually and be available to assist you with reviewing it and keeping it up-to-date so that it serves as a valuable resource to your family when your plan matures.
  - Preparation of change of beneficiary/ownership forms for newly acquired and changed assets.
  - Any in-state deeds for newly acquired properties will be prepared at 50% of our standard price. Additional fees will apply for out-of-state deeds.
- *Review*. There will be changes in your life and in the law that require your estate planning documents to be reviewed regularly.
  - We will conduct a one-hour Family Care Meeting as needed with you, your family, and your advisors. We recommend you request this meeting at least every 3 years. It can be held in-person, by telephone, or video conference.
  - If there are changes in the law, we will notify you and update your plan upon request.
  - Reasonable word-processing type changes are included on an as-needed basis, but no more than once per year. Examples include updating names, dollar amounts, or percentages.
- *Education*. Members-only educational events will be available to you, including the following:
  - Our annual Trustee School gives your chosen Trustee an opportunity to learn what it means to serve in that role.
  - Exclusive Off the Clock workshops where you and a guest have the opportunity to ask questions and get your answers in an open forum.
- *Support*. Our team is readily available to answer your questions or concerns during normal business hours via telephone or email.
  - Reasonable phone calls and emails including scheduled attorney telephone conferences, if needed.
  - Convenient access to electronic copies of your signed estate planning documents.
- *Annual Appreciation Event*. You will be invited to a members-only annual appreciation event.

Services Not Included:

- Preparation of legal documents outside the scope of the initial engagement.
- Excessive phone calls or email communications.
- Off-site meetings of any kind.
- Drafting of complex estate planning provisions.
- Repeated preparation of documents due to a canceled signing meeting.
- Future services related to crisis asset protection planning or estate and trust administration.