

CLIENT CARE PROGRAM



Virtual or in-person one hour meeting to review your existing Estate Plan approximately every three (3) years to determine whether your goals are still aligned with your plan and your assets are properly owned (titled) and/or have appropriate beneficiaries named.	✓
Access to our highly trained estate planning team of attorneys, paralegals, and legal assistants for advice regarding your Estate Plan and its maintenance. Calls or emails responded to within one business day.	✓
Updating your Estate Plan (Trust, Will, POAs) documents prepared by Estate Law Partners, LLC to reflect a change in your decision makers or to amend existing Articles within your plan.	✓
Virtual or in-person one hour meeting with your successor trustee to explain the structure of your Estate Plan, identify roles and responsibilities, and answer questions or concerns related to your plan.	✓
Exclusive access to our digital Successor Trustee Manual at the first annual renewal of your membership.	✓
Discuss legal questions such as small business matters and real estate for referral without charge.	✓
Access 24/7/365 to your private, secure web portal where digital copies of your legal documents are stored.	✓
Prepare Health Care documents at no charge for your children as they turn 18.	✓
Invitation to our annual virtual estate law update.	✓
Annual Investment (billed annually)	\$250

Optional Extras for Client Care Program Members

Access to our Funding Coordinator for ongoing advice to ensure proper asset alignment with your Estate Plan at a preferred rate.	\$50 per 30-minute session
Additional Wisconsin, Illinois, or Michigan deed preparation at a reduced rate.	\$250 per deed
Directive Communication Systems (DCS), a Digital Asset Management subscription to ensure digital property is visible, accessible, and maintained while preventing digital content providers from locking estates out or deleting data.	\$350 per year

Thank you for choosing Estate Law Partners, LLC as your legal service provider to design and implement your Estate Plan!