CLIENT CARE LEGACY PROGRAM

& EXCLUSIVE CLIENT PORTAL

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WELCOME TO ADLER LAW

A Guide to our Client Care Legacy Program

As a client of Adler Law, you will receive a complimentary six-month Essential Membership in our Client Care Legacy Program upon enrollment. Our Client Care Legacy Program provides our clients with peace of mind, ensuring that your Will, Trust, and Advance Directives (Power of Attorney, Living Will, and Health Care Proxy) are ready and accessible when you and your family need them the most. Moreover, our program affords our clients the security of being able to reach out to us whenever they have a question, concern or need to make a simple change to their estate plan, without the worry of hourly billing or excessive legal fees. There are two tiers of membership in the Client Care Legacy Program: Essential and Elite.

ESSENTIAL MEMBERSHIP BENEFITS:

- Private Client Portal with 24-Hour Access to Your Legal Documents
- Membership Card to Access Your Client Portal
- Legal Updates to Your
  - Power of Attorney
  - Living Will
  - Health Care Proxy
- Simple Amendments to Your Will or Revocable Living Trust, including
  - Changing Your Fiduciary
  - Changing Percentages Among Beneficiaries
  - Adding or Removing a Beneficiary
- An Annual Year-End Detailed Summary of Your Current Estate Plan
- Exclusive Educational Programs & Workshops
- Ten (10%) Percent Discount on all future legal services
- Access to our estate planning team when you have questions or concerns
- Referrals to a vast network of vetted attorneys that practice in all areas of law

ELITE MEMBERSHIP BENEFITS:

- All of the benefits from the Essential Membership PLUS
- Annual in-person or video Estate Planning Conference with an attorney
- Twenty (20%) Percent Discount on all future legal services

LEGAL UPDATES

Laws are in a constant state of flux. Unless you closely follow state legislation and court case developments, you will not know when a new law or judicial decision affects your estate plan.

But we will.

Changes in the laws of the State of New York and at the federal level can have significant effects on your will, trust, investments, and retirement accounts. If you don't keep your estate plan up to date, it may not function as you initially intended; not only at your passing, but also if you become disabled or incapacitated during your lifetime.

Therefore, it is vital that you regularly revisit your estate plan rather than locking your estate planning documents in a drawer and forgetting about them. We also realize that it is both daunting and time consuming to keep up with constant legislative changes.

That is why WE come to YOU every year with a detailed written summary of your estate plan; so you do not have to remember to review it.

CHANGES IN FAMILY AND LIFE CIRCUMSTANCES

Changes in tax and estate laws aren't the only matters that can affect your estate plan. The Client Care Legacy Program keeps your estate plan up to date with your ever-evolving family and financial circumstances.

Simple changes to your estate plan like adding a beneficiary, are included at no additional cost. Removing a beneficiary, executor or trustee, or changing the amount or percentage of a bequest are also examples of changes that will not cost you any more than your annual enrollment fee.

You will not have to worry about being "on the clock" or having to spend thousands of dollars in legal fees to make simple changes needed as a result of evolving circumstances that every family experiences from time to time.

OUR CLIENT PORTAL

Our Client Portal will provide you with 24-hour access to your important legal documents; including your Power of Attorney, Living Will, and Health Care Proxy.

Should you find yourself in a hospital late at night or during a holiday, have no worries - you can download your documents directly from the Client Portal. You may also choose to give access to your trusted loved ones.

The Client Portal gives you much more!

- Record a video and upload it to your secure and exclusive Client Portal
- Send messages of love and support, or even instructions, to your loved ones regarding your thoughts and wishes for them in handling any assets that you are passing on
- Upload your prepaid funeral arrangements and instructions
- Send messages to our legal team

OUR CLIENT CARE

TOOLS & RESOURCES

WORKSHOPS

We conduct client workshops free of charge for our Client Care Legacy Program members and their guests. We discuss updates to trust, estate, and tax laws, as well as techniques that are available to ensure your estate plan accomplishes everything you hope for; giving you and your loved ones confidence that your plan is up to date.

NEWSLETTERS

Our legal team drafts newsletters on estate planning tips, thoughts, and insights. We cover common sense matters in estate planning, real estate, taxes, issues you may face upon a loved one's passing, as well as how to select your executors and trustees, and other valuable insights on asset alignment.

All of these resources are available to Client Care Legacy Program members for free!

KEEPING IT UP TO DATE

It is evident how the Client Care Legacy Program provides you and your family with the utmost in comfort and clarity; providing you with the knowledge that your estate plan will never fall out of date in an ever-changing world. We offer two levels of membership so you can choose which level is right for you and your family.

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ESSENTIAL MEMBERSHIP

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The Essential Membership is built exclusively for clients of Adler Law.

- Every year you will receive a written review of your current estate plan, detailing the estate planning vehicles you have in place, the fiduciaries appointed, and the beneficiaries named.
- If a law changes affecting your estate plan, we will let you know and create an amendment, where possible, to keep your plan in compliance and up to date.
- If your family or financial circumstances have changed, you should consider adjustments to your plan accordingly.
- If you have acquired new assets or accounts during the year, we will help you properly fund those assets into your trust where applicable.
- Your exclusive and personal Client Portal is available to you 24 hours a day, 7 days a week.

You simply cannot pass up these benefits as you've already invested significant time, effort, and money into your estate plan. Do not let that plan become obsolete when it's so easy to let us keep it up to date for you for a nominal annual fee.

New clients of Adler Law receive at least 6 months of the Essential Membership for free. The membership fee is billed once annually, each January 1st or July 1st depending upon your date of enrollment, so any remaining free months are credited to your membership on your applicable billing date. Your Essential Membership could save you thousands of dollars in legal fees and more importantly, peace of mind that your estate plan is always up to date.

Single Client	$600/annually
Married Client	$700/annually

ELITE MEMBERSHIP

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The Elite Membership is geared towards those clients who desire an annual face-to-face consultation with their attorney. While the Essential Membership works to keep your plan up to date, the Elite Membership includes annual in-person conferences with an attorney.

Many estate plans and family situations speak to the necessity of having an annual in-person conference, especially if:

- Your financial situation is such that the type of assets you own materially changes
- You bought or sold real estate
- You opened new bank accounts or brokerage accounts
- You have new children or grandchildren
- Blended marriages and children not of that marriage
- You are considering marriage or divorce
- You inherited assets from a loved one either outright or in trust
- You are considering retirement

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- Your named successor trustee, executor or agent under your power of attorney or health care proxy may no longer be the right choice for you
- A beneficiary is undergoing a divorce or financial difficulties
- A beneficiary is experiencing significant health problems
- Your health has changed
- You are selling commercial or rental properties and seek to avoid capital gains taxes
- You are considering making substantial gifts to your loved ones or to charities
- You are financially supporting a loved one, including making gifts for medical and/or educational expenses
- You are considering selling a closely-held business or have sold your business recently
- Your company has provided you a retirement benefit that requires you to make a choice as to whether the contract should be paid out in lump sum, or continue on for your lifetime and/or that of your spouse
- You are considering purchasing long-term care insurance
- You changed financial advisors and/or other professionals
- You are considering purchasing an annuity or life insurance
- You recently filed a Federal Gift Tax Return Form 709
- You may receive deferred compensation
- A family member suffers from substance abuse issues
- Any other significant development in your family, professional or financial life that affects your estate plan

When any of the above circumstances apply to you, it is advisable to have a face-to-face meeting with your attorney. This benefit is provided exclusively through our Elite Membership.

Your children or other loved ones are always welcome to the annual in-person meeting included in the Elite Membership.

We also offer video conferencing in the event they are unable to attend the meeting in-person or live out of state.

The annual fee for the Elite Membership is:

	Single Client	$900/annually
	Married Client	$1,000/annually

NEXT STEPS

Complete the Client Care Legacy Program Enrollment Agreement to ensure that the investment in your estate plan achieves its greatest value. We value our continuing relationship with you and your confidence in the work we do.

If you are unsure which membership tier in the Client Care Legacy Program is right for you, please do not hesitate to contact us to discuss your options and ensure that you choose the membership tier best suited for your needs.

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