ADLER LAW
LEGACY MATTERS
390 North Broadway, Suite 200 Jericho, New York 11753

RE: <u>Introduction to the Client Care Legacy Program</u>

Dear Valued Client:

Congratulations on taking the important step of putting an estate plan in place to alleviate the burden on your loved ones and to make certain your assets pass in accordance with your wishes. We understand that family situations and life circumstances are always evolving. Similarly, New York State and federal laws are in a constant state of flux. As your estate planning attorneys, we want to ensure that you have the ability to update your estate plan with ease and address any life or legal changes without hesitation. As such, we are introducing a service that many of our clients have requested: the Client Care Legacy Program. We are one of the few firms in our area offering this type of program, and we trust that you will find it of great value.

What is the Client Care Legacy Program?

The Client Care Legacy Program provides you with the security that your estate plan will be up-to-date and ready when you need it the most. Family and financial circumstances change throughout the years, and that's a good reason to re-visit your estate plan from time to time. Further, the tax and estate planning laws change frequently. Through the Client Care Legacy Program, we will come to you to alert you of legal changes and remind you that life changes may require changes to your estate plan. The program is a means for us to communicate with you, and for you to communicate with us on a continuing basis and not be worried about getting an hourly invoice from our firm. Do not let the fear of receiving a bill for our time make you reluctant to contact us regarding important matters that might affect your plan.

Client Care Legacy Program Features

We are introducing our Client Care Legacy Program with the following features:

- Two tiers of membership, allowing you to select the plan that best suits the needs of you and your family;
- A client portal that will allow you to have 24-hour access to your estate planning documents;
- Legal updates to your power of attorney, living will and health care proxy;
- Simple amendments to your will or revocable living trust;
- An annual year-end detailed summary of your current estate plan;
- Access to our estate planning team when you have questions or concerns;

- Workshops, newsletters and programs focusing on changes to the law, techniques and other matters that are of concern to you and your loved ones; and
- Discounts on all future legal services.

We envision our program services expanding over time. We will also seek your input on how these services positively impact your level of comfort and clarity over some of the most important matters affecting you and your family.

How Much Does Membership Cost?

We are offering you six months of Essential Membership for free so you can determine if the Client Care Legacy Program is right for you and your loved ones. After the initial six-month period, remaining in the program will be $600 annually for single clients and $700 annually for married clients for Essential Membership and $900 annually for single clients and $1,000 annually for married clients for Elite Membership. You will also have the opportunity to earn additional months of Essential Membership for free through our incentive program.

If, after the initial six-month period, you don't find value in our service, you can discontinue your membership without any further charge. We will always remain your estate planning counsel, but our services will be billed at our standard legal rates.

How To Enroll

Enrollment is easy. Please sign the enclosed Enrollment form and return it by either emailing a copy or mailing it back to us.

We are excited to bring these services to you. We wish to provide our clients with a means by which they can avoid a situation where they fall ill or pass away with their estate plan being out of date. The Client Care Legacy Program will allow you to rest assured that your estate planning concerns can be addressed when they arise, without the worry of hourly billing and unpredictable legal fees.

We look forward to increasing your access to us – and serving our clients even better than before.

Very truly yours,

Steven M. Adler