



ADLER LAW

LEGACY MATTERS

Client Care Legacy Program Benefits

	Essential Program	Elite Program	
Benefits	Included in Plan		Average Non-Member Value*
24 Hour Portal Access to Estate Planning Documents	✓	✓	—
Membership Card	✓	✓	Priceless
Simple Updates to your Will or Revocable Living Trust	✓	✓	\$1,000-\$3,500
Updates to Advance Directives	✓	✓	\$500-\$750
Annual Review Summary Mailed to Clients	✓	✓	\$450-\$500/hour
Access to Adler Law Legal Team for Questions or Concerns	✓	✓	\$450-\$500/hour
Educational Programs or Workshops	✓	✓	—
Annual Attorney Meeting to Review Current Plan and Asset Alignment	—	✓	\$450-\$500/hour
Discount for Future Legal Services	10%	20%	—
Membership Fees			*Rates are subject to change
Single Clients	\$600/year	\$900/year	
Married Clients	\$700/year	\$1,000/year	

