



ADLER LAW

LEGACY MATTERS

390 North Broadway, Suite 200 Jericho, New York 11753

Client Care Legacy Program Enrollment Agreement

The Client Care Legacy Program (the “Program”) is exclusively for existing clients of Adler Law Firm, PLLC (the “Firm”). As a precondition to enrollment, clients must have Basic Estate Planning Documents drafted, by our firm, as defined by paragraph thirteen (13) below. If you have questions as to whether your document meets this criteria, please ask and we will advise. The following provisions replace any and all prior provisions governing the Legacy Program:

1. There are two levels offered. All clients will initially be enrolled in the “Essential Legacy Program”. Clients may opt-in to the “Elite Legacy Program”.
2. The annual fee for the Essential Client Care Program is Six Hundred (\$600.00) Dollars for a single person, and Seven Hundred (\$700.00) Dollars for a married couple.
3. The annual fee for the Elite Client Care Program is Nine Hundred (\$900.00) Dollars for a single person, and One Thousand (\$1,000.00) Dollars for a married couple. This includes a yearly meeting with an attorney from the Firm.
4. Upon the initial signing of an estate plan including a Revocable Living Trust with the Firm, clients are entitled to six (6) months of free membership in the Essential Client Care Program. The annual fee will be automatically charged to clients' credit card the first business day of July, for clients who sign up from January to June, and the first business day of January, for clients who sign up from July to December. The first term's charge following enrollment will be prorated based upon the number of free months remaining in clients' six (6) free months of the Program calculated from the calendar month of signing to the enrollment year's end.
5. In addition to the six (6) free months of free Essential Client Care Program enrollment when signing up for the program, we offer an Incentive Program where members can earn an additional six (6) months of free Membership by leaving our firm a 5-star review on Google, or by referring friends or family to our firm during their initial six (6) months of free membership. A maximum of six (6) months of free membership can be earned through the Incentive Program.
6. Charges to clients' credit card will occur each subsequent year on the first day in January or July, based upon the enrollment date, unless clients notify the Firm in writing of withdrawal from the Program. Clients may cancel their enrollment at any time. Such notice must be delivered via US Postal Service or by overnight delivery service to the Firm's address: **ADLER LAW FIRM, 390 N. BROADWAY, SUITE 200, JERICHO, NY 11753 ATTENTION: LEGACY PROGRAM**. Clients will lose all privileges of the Program immediately upon the Firm's receipt of clients' notice of withdrawal or cancellation. If clients wish to re-enroll in the Program, clients may be required to make up prior year payments at the Firm's discretion.
7. Clients may switch between the Essential and Elite Programs on an annual basis by notifying the firm by December 15th for the next calendar year term. Clients may change their enrollment by notifying the Firm in writing by US Postal Service or by overnight delivery service to the Firm's address: **ADLER LAW FIRM, 390 N. BROADWAY, SUITE 200, JERICHO, NY 11753 ATTENTION: LEGACY PROGRAM**. No partial refunds will be afforded to those switching from the Elite to the Essential Program during the calendar year.

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8. As a condition to enrollment in the Program, clients acknowledge that any waiver of conflict of interest necessary for the Firm to represent a married couple continues to apply, as does any other waiver of confidentiality that clients may have executed as part of clients' estate plan. (For example, the waiver client may have signed allowing the Firm to discuss clients' planning with clients' CPA or financial advisor so that clients' advisors are coordinated within clients' plan.)
9. Each year the Firm provides clients with a written review of clients trust and ancillary documents. Clients have an obligation to inform the Firm of any errors or omissions in this written review so any corrections or changes can be made.
10. Clients have an ongoing obligation to inform the Firm of any material change in his or her health, financial condition, marital status, or family situation, as these are factors in every estate plan that must be considered when recommending modifications, changes or updates.
11. Clients have an ongoing obligation to inform the Firm of any changes in beneficiary designation forms or new bank or brokerage accounts, annuity or life insurance policies, or real property or residences so these assets can be properly funded in clients' current estate plan.
12. Clients have an obligation to provide copies of any Federal Gift or Estate Tax Returns filed.
13. The Essential and Elite Legacy Program are solely for Revocable Living Trusts, Retirement Plan Legacy Trusts, and clients' Advance Directives. Neither the Essential or Elite Program includes reviews and/or updates to Irrevocable Trusts, Family Limited Partnerships, LLCs, Corporations, or other advanced estate planning strategies. Clients should meet with a Firm attorney periodically to ensure advanced planning strategies are up to date.

The firm retains a continuing right to modify the Program's (i) fee schedule; (ii) benefits; and/or (iii) enrollment requirements. Any Program modifications will be forwarded in writing to clients' last known mailing address at least thirty (30) days before any modifications to the Program are enacted. For purposes of these Terms of Enrollment, when referring to client or clients, the plural shall be read as singular and vice versa as may apply to the undersigned.

I / We _____ hereby:
Print Name(s)

- ____ Authorize enrollment into the Essential Program
____ Authorize enrollment into the Elite Program
____ Decline enrollment into the Legacy Program

in accordance with the above, dated this _____ day of _____, 20____.

We authorize the Firm to charge our Visa/Mastercard Card/American Express # _____
CVV _____ expiration date _____ in the name of _____ at
the following Billing Address:

Email: _____

as per the above terms of enrollment

Client

Client

Plan Type

Matter Number