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The FamilyCare Program is designed to ensure that your plan remains as current as possible.

www.trustcounselpa.com

FEATURES	 STANDARD	 PREMIER
Annual Appreciation Luncheon and Estate Planning Update	●	●
Email and phone access to attorneys regarding your basic plan*	●	●
Amendments to plan documents to change a name	●	●
3 Year comprehensive review of basic plan	●	●
Health Care document emergency access cards	●	●
Annual subscription to digital asset management tool	●	●
Trustee Manual (step by step overview of the role of Successor Trustee)	●	●
Family Meeting (with adult children or other fiduciaries) upon request	●	●
One-hour post-mortem consultation with trustee/fiduciary	●	●
Free Estate Planning consultation for referrals	●	●
Health Care documents for adult children**	●	●
10% discount on basic estate plans for your adult children**	●	●
10% discount on fees for estate and trust administration	●	●
10% discount on future basic estate planning	●	●
Email and phone access to attorneys regarding your basic and complex plan***		●
Annual comprehensive review of entire plan		●
Registered Agent Services for North Carolina and Florida entities (up to 2)		●
Filing of Annual Report of Corporations and LLCs (up to 2)		●
“Crummey Letter” services for Life Insurance Trusts		●
10% discount on future complex estate planning		●
SINGLE	\$495.00	\$795.00
COUPLE	\$695.00	\$995.00

* Basic Plan includes: Living Trusts, Wills, Durable Powers of Attorney and Health Care Documents

** FL, NC, NY, and TN only

*** Complex Plans Include: IRA Trusts, Family Limited Liability Companies, Domestic Asset Protection Trusts, Special Needs Trusts, etc.