



BENEFITS FOR 1ST YEAR GRATIS MEMBERS

A protection plan for your living trust

Our 1st Year Gratis membership is a complimentary one year introduction to the benefits of maintaining an ongoing relationship through our exclusive RWay program.

1ST Year Gratis Member Benefits Include:

-  Annual Membership Forum explaining changes in tax laws, IRS rulings and planning techniques
-  One personal meeting to review your estate plan during the term of your renewal
-  Review of asset titles and beneficiary designations
-  Trustee Training (The Trust Process) Workshop
-  Trustee Training (The Administration Process) Workshop
-  LegalVault membership
-  LegalVault Training/Q&A Session
-  Unlimited telephone consultations to answer your estate planning questions
-  Personal consultations regarding advanced planning needs as they arise
-  RWay client newsletter
-  Value of entire estate planning team to protect your interest