

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:

- M Annual Membership Forum explaining changes in tax laws, IRS rulings and planning techniques
- Mr 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
- W LegalVault membership
- LegalVault Training/Q&A Session
- W Unlimited telephone consultations to answer your estate planning questions
- W Personal consultations regarding advanced planning needs as they arise
- **RW**ay client newsletter
- W Value of entire estate planning team to protect your interest