



*A protection plan for your living trust*

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## **Exclusively For Wilson Law Group Trust Clients**

Wilson Law Group has carefully developed a trust maintenance program for Enrolled members designed to assure your trust plan remains current with today's tax laws, your changing financial picture, and your family needs. RWay for Enrolled members is designed to address the critical points that may affect your trust on an annual basis at an affordable price.

### **Enrolled Member Benefits Include:**

- W* Annual Membership Forum explaining changes in tax laws, IRS rulings, and planning techniques
- W* One personal meeting to review and update your estate plan during the term of your renewal
- W* Trust amendments incorporating improved estate planning strategies and response to law changes
- W* Inclusion of approved amendments, such as change of trustees
- W* Review of asset titles and beneficiary designations
- W* Unlimited workshops teaching clients and successor trustees about specific estate planning issues and concepts
- W* LegalVault membership and a LegalVault Training/Q&A Session
- W* RWay client newsletter
- W* Unlimited telephone consultations to answer your estate planning questions
- W* Personal consultations regarding advanced planning needs as they arise
- W* Trust administration at a fixed cost
- W* Historical financial documentation that may be useful for nursing home admissions
- W* Tracking of changes in state and federal laws and regulations
- W* Value of entire estate planning team to protect your interest

**ALL Excellent reasons to protect your family RWay!!**

*PROTECT YOUR FAMILY.....YOUR TRUST....BY PLANNING FOR TOMORROW*

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