PWW law
CARES PROGRAM

Continued Alignment, Review, Education, and Support

PWW Law CARES about you and your family. We believe that estate planning is a process and not a transaction. Continued alignment, review, education, and support is necessary to make sure your plan works when you need it to, that is upon your disability or death. We automatically enroll all our new Trust clients into our CARES Program and greatly encourage them to renew their membership after the expiration of their initial term.

The PWW Law CARES Program includes the following benefits:

- *Alignment*. After the initial alignment of your assets with your estate plan, changes will inevitably occur. Keeping up with those changes is critical to the success of your plan.
    - Our team will collaborate with you and your other advisors so that we are all working together with the mutual goal of taking care of you and your family.
    - We will provide a copy of your Asset Folio to you annually and be available to assist you with reviewing it and keeping it up-to-date so that it serves as a valuable resource to your family when your plan matures.
    - Preparation of change of beneficiary/ownership forms for newly acquired and changed assets.
    - Any in-state deeds for newly acquired properties will be prepared at 50% of our standard price. Additional fees will apply for out-of-state deeds.
- *Review*. It is important to realize that there will be changes in your life and in the law that require your estate planning documents to be updated.
    - We will conduct a one-hour Family Care Meeting as needed with you, your family, and your advisors. We recommend you request this meeting at least every 3 years. It can be held in-person, by telephone, or video conference.
    - If there are changes in the law, we will notify you and update your plan upon request.
    - Reasonable word-processing type changes are included on an as-needed basis, but no more than once per year. Examples of word-processing changes include updating names, dollar amounts, or percentages.
- *Education*. A variety of members-only educational events will be available to you and your family, including the following:

    - ❖ Our annual Trustee School gives your chosen Trustee an opportunity to learn what it means to be serve in that role.

    - ❖ Exclusive Off the Clock workshops where you and a guest have the opportunity to ask questions and get your answers in an open forum.

- ❖ *Support*. Our team is readily available to answer your questions or concerns during normal business hours via telephone or email.

    - ❖ Reasonable phone calls and emails including scheduled attorney telephone conferences, if needed.

    - ❖ Convenient access to electronic copies of your signed estate planning documents.

- ❖ *Annual Appreciation Event*. In addition to all of the above described services, you will be invited to a members-only annual appreciation event.