

Continual Purposeful Planning Program Membership Benefits

1. **Purposeful Planning:** This is a deeper focus on your values by capturing your voice and vision. The intent is to more closely match your legacy plan with what matters most to you and help your children feel loved, appreciated, trusted, and gratitude for what you have done for them. This will help prevent dependency, entitlement, and hurt feelings.
2. **Continuing Education:** You and your family have the opportunity to attend workshops, offered exclusively for participants in our Continual Purposeful Planning Program, their family and successor trustees. Each year we offer the Trustee Training Workshop to educate your loved ones on what to do in the event of your disability or at your death. Two of the other workshops we have conducted in the past include:
3. **Biennial Update of Your Documents:** Every two years we update your trust, will, financial and medical powers of attorney for any changes in the law and for any enhancements and improvements in the legal language and strategies. We also make modifications to your documents dictated by changes in your assets or family situation and changes requested by you. All of these changes are made without any additional charge to you, if you are current in our Continual Purposeful Planning Program.
4. **Biennial Video Journal Entries:** Every two years we provide you with an opportunity to sit in front of a camera to talk about your intentions for your estate plan, fun memories from the past two years, your family legacy, goals for your children, and any other topic that is important to you.
5. **Access to ClientDocx:** ClientDocx is an online vault of your estate planning documents that is both secured and encrypted. This provides you with access to your documents as long as you can access the internet
6. **Funding Assistance:** We provide ongoing assistance and counseling during the acquisition, sale or disposition of trust property, whether currently owned or acquired in the future (*in other words, funding new assets*), for active participants in our Continual Purposeful Planning Program.
7. **Telephone Consultations and Meetings:** Participation in our Continual Purposeful Planning Program includes no cost telephone consultations, on an as needed basis, with members of our firm regarding funding, titling, plan maintenance, or plan operation.
8. **Lower Costs:** There are three main costs associated with an estate plan: drafting, updating, and administrating. If you are current in our Continual Purposeful Planning Program, these three costs are approximately ½ of what it would cost if you were not part of our Continual Purposeful Planning Program. Additionally, because of the trustee trainings, the quality of the administration of your trust is higher than it would be otherwise, thus promoting family harmony.
9. **Future: DocuBank:** DocuBank allows you to carry your incapacity documents with you electronically on a credit-card sized card in your wallet. If needed, the hospital can contact DocuBank, who will then send your documents to the hospital.