

**Law Offices of Berge & Berge LLP
Trust and Estate Planning Specialists**

LifePlan™ Trust Maintenance Program Membership Benefits

Benefit	Description	Savings
	Communications	
Free Monthly Newsletter	Learn about the latest developments in estate planning through your free subscription to our <i>monthly</i> newsletter.	\$39
Free Workshops and Seminars	It is often said that, “We all know what we know, and we all know what we don’t know, but it’s those issues that we don’t know that we don’t know about that most concern us.” Become an educated consumer. Become actively involved in your estate planning by attending our free workshops and classes about a wide range of issues which concern you, such as Why Many Estate Plans Fail, Effective Financial Planning and Tax Planning and Choosing a Professional Trustee.	\$225
Free Annual Law Update	At the beginning of each year learn about the latest legal developments that affect your estate plan. Why read about it from unreliable sources such as the Internet or the media when you can hear about it from you own attorney.	\$225
Free Annual Plan Review	Review an annual summary of your plan with a staff member and tell us about any changes you would like to make. As part of our free document update service, you can substitute a successor trustee, remove a beneficiary, and make other reasonable changes to your plan at no cost to you. Included with your review is a survey of your assets and how they are titled to help identify property and accounts that may not have been funded to your trust. Having an up-to-date list of assets is also important for helping your successor trustee manage your financial affairs in the event you become disabled or pass away.	\$495
Free Phone Calls	Call us anytime you want to speak with an estate planning specialist to discuss trust funding issues, beneficiary designation issues, changes in your family or economic situation, changes you recently read about in the newspaper, or for any other reason, at no cost to you.	\$210
Free Successor Trustee Training	To ensure an orderly transition from you to your successor trustee, we provide a free three-hour group training session for you and your successor trustee (s). In this seminar, the attorney explains the powers and duties of your successor trustee and the tasks they will be asked to perform.	\$675
Successor Trustee Meeting at No Charge	Upon your death, your successor trustee receives a free consultation to discuss the tasks that need to be accomplished during trust administration, and the best ways to accomplish those tasks.	\$425

Documentation		
Free Document Updates	Have you ever changed your mind about the name(s) of your successor trustee(s) or health care agent(s)? Have you ever wanted to make a small cash gift to a loved one upon your passing, change your successor trustee or remove a beneficiary? As a LifePlan™ member, you are able to make these types of changes to your plan documents without an additional charge. These updates also include any necessary modifications to your plan's technical provisions as a result of changes in the law.	\$795
Discounted Rates on Plan Upgrades and Trust Administration Services	As a LifePlan™ member, you will also be able to upgrade your Estate Plan at any time merely by paying the difference in price between your old plan and your new plan. Moreover, when the time comes and your plan needs to be implemented, your estate will receive a ten percent discount off our normal hourly fees.	\$1,000+
Asset Registration		
Free Annual Trust Funding Review	How are your bank accounts currently titled: as individual assets, jointly-held assets, payable-on-death assets, or as trust assets? How should title be held? Who is named as the beneficiary of your life insurance policies and retirement accounts? At no cost to you, let us help you review an inventory of all your financial assets to determine their ownership or beneficiary status. A periodic review of your asset list helps ensure that your trust remains funded and can be adjusted as changes occur in asset valuations.	\$210
Discounted Trust Transfer Deeds	When was the last time you refinanced your home or rental property? Was your property removed from your trust as part of the loan transaction? Did you ever put it back into your trust after the refinance was complete? If not, we'll do it for you at a reduced fee.	\$28
Free Notary Services - Berge Legal and Bank Documents	When was the last time you needed to notarize a bank document? Next time, just schedule a time with us and we'll do it for you for free	\$20
Total Savings		\$4,347+
Total Annual Cost - Single		\$350
Total Annual Cost - Married		\$425

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