

# CONTINUOUS COMMITMENT



## ***Included in your Membership:***

- ✓ Phone Calls, Emails, Copies, etc.
- ✓ Questions Answered
- ✓ “Word Processing” Amendments
- ✓ Annual Asset Review Report
- ✓ Annual Estate Planning Review Worksheet

## ***Group Estate Plan Updates:***

- ✓ Annual Client Meeting (ACM)
- ✓ Client Update Program (CUP)

## ***Continuing Education:***

- ✓ LifeFocus Planning Educational Programs
- ✓ Nuts ‘n Bolts
- ✓ Family Meetings

## ***DocuBank® Membership***

- ✓ 24/7/365 Access to Advance Directives

## ***Directive Communication Systems (DCS)®***

- ✓ Digital Asset Management

## ***Personalized Plan Assistance***

- ✓ Personal Property (Special Stuff) Memorandum
- ✓ Healthcare Letter of Instruction
- ✓ Final Arrangement Instructions
- ✓ Final Family Letter

## ***Communicating and coordinating with your Advisors & Helpers***

