

Client Commitments

I understand that Law Office of Matthew A. Ferri, PLLC will need my assistance in implementing my estate plan and make the following commitments:

I will notify the firm of any changes in my family circumstances as they may arise from time to time.

I will provide assistance in the initial funding of assets to my revocable living trust and I will work *with* the firm to maintain the funding of my trust over my lifetime to assure my estate avoids probate.

I will assure my "helpers" are adequately prepared by completing an educational program within 12 months of signing my estate plan. I understand that my "helpers" may either attend a live or pre-recorded educational event.

I will promptly register and attend an Annual Client Meeting each year and a Client Update Program every other year.

I will update my list of financial assets each year.

I will complete and return my Estate Planning Review Worksheet within 2 weeks of attending a Client Update Program.

I understand and acknowledge that my questions are important. I commit to call the firm with any questions I may have.

I understand that if I do not meet my commitments I may no longer be eligible to maintain my enrollment in the LifeFocus Planning™ program.

Client Signature

Date

Client Signature

Date

Law Firm Commitments

We understand that you, our client, will need the assistance of our entire service team in implementing your estate plan and we each make the following commitments:

We commit to prepare your documents in a timely manner and will deliver your Trust and Ancillary documents within 21 days of your Counseling & Design Meeting.

We commit to complete the funding of your trust within 120 days of your Funding Meeting provided you and your asset holders provide assistance in a timely manner.

We commit to return phone calls or schedule a phone appointment within 48 hours of receiving your call.

We will work with your other professional advisors to ensure that your estate plan is properly structured to implement your goals and objectives.

We commit to provide opportunities each year to educate you and your family members and other trust helpers in understanding your planning.

We understand and acknowledge that your questions are important. We commit to take the necessary steps to ensure your questions are answered.



Matthew A. Ferri, Attorney and
Counselor



Andrea L. Baade, Attorney and
Counselor