

VIP MEMBERSHIP PROGRAM

Program Cost is \$349 Per Year!

MEMBERSHIP BENEFITS	DESCRIPTION	VALUE
Annual Plan and Asset Review	Annual Plan Review and UNLIMITED free Amendments Due to Life and Law Changes So Your Plan Works – ALWAYS!	\$570
Unlimited Access to Phil for Legal or Financial Questions and 25% Discount on Services	Call us Anytime to Ask Legal or Financial Questions. Get access to Phil and Referrals to a Trusted Team of Advisors at NO COST to You. Also receive a 25% discount on legal services.	Priceless
Access to Your Health Directives 24 Hours a Day 7 Days a Week	Have Access to your Health Care Directives When and Where You Need Them	Priceless
Members Only Workshops	Informative, Educational and Fun Workshops and Events (Including our annual Christmas Party) Available to Members only	\$400
Members Only Newsletter	Monthly Newsletter With Valuable Information Related to Your Estate	\$200
Free Estate Check Up for Member's Children and 25% Off Their Estate Plan	Make Sure Your Children Take Care Of Their Planning Needs By Encouraging Them To Take Advantage Of This Valuable Offer – Especially If They Have Minor Children	\$625- up
Free Estate Check Up for Member's Parents and 50% off Estate Plan	Free Estate Check Up For Parents. Your Parents Can Enjoy the Comfort of Knowing Their Plan Is in Place and Enjoy a 50% Discount	\$1,250 - up
Free Health Care Directive; Financial Durable Power of Attorney and HIPAA Release for Dependents	Free Health Care Directive, Financial Durable Power of Attorney and HIPAA Release for Adult Children Up to the Age of 25 and Parents Over the Age of 65 Who Do Not Have Probable Assets	\$850 – up
Free Medi-Cal Eligibility Assessment	Free Consultation to Determine if You or Your Loved Ones Are Eligible for Medi-Cal Long Term Care Benefits and 25% off Planning Fees	\$285
Annual Afterthoughts Conversation	Pass Your Thoughts, Values and Memories on To Your Loved Ones Through a Recording Lovingly Prepared For Them By You!	\$400



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Achieve the Peace of Mind that Comes from Having a Well Planned Estate