# The Client and Family Care Plan

## STAPLETON ELDER LAW

*The Client & Family Care Plan is designed to provide you with a way to ensure your estate plan is always up to date. At Stapleton Elder Law, we know that estate planning isn't an event, it's a process, and we stand ready to walk alongside you every step of the way. Because change is inevitable, peace of mind is essential.*

## The Benefits of Membership

| | TRUST | WILL |
|---|---|---|
| FREE annual review of your Estate Plan (30 minute private consultation). | ☑ | ☑ |
| FREE administrative changes to your estate plan (add a beneficiary, update a Trustee, change POA, etc.) | ☑ | ☑ |
| FREE Docubank Subscription (24-hour online access to your medical documents). | ☑ | |
| FREE phone calls to the firm regarding your estate plan.* | ☑ | |
| FREE legal assistance funding a trust with after-acquired or overlooked assets (filing fees extra). | ☑ | |
| FREE guardianship advice– help your children protect your grandchildren. | ☑ | |
| FREE Advance Medical Directive (AMD) /Living Will for a family member. | ☑ | |
| Grandfathered pricing! CFCP members lock in the rates from the year they joined the program. | ☑ | ☑ |
| Progressive Earning of a new Trust or Medicaid Crisis Plan (% off each year you remain in CFCP, up to 50% off). | ☑ | ☑ |
| FREE consultation with the family, Executor, and/or Trustee upon death or disability of a client. | ☑ | |
| Discounted and guaranteed fee for estate administration upon death. | ☑ | ☑ |
| Access to our trusted referral sources (financial planning, retirement/tax advice, insurance, business planning, etc.). | ☑ | |
| Peace of mind knowing we're ensuring that life-changes are incorporated into your plan. | ☑ | ☑ |

**Membership is just $495/year for our Trust clients or $250/year for our Will-only clients.**

** Number of calls limited to the firm's discretion and availability.*

STAPLETON ELDER LAW
*Guiding You Through The Journey Of Your Senior Years*


***Offices in Charlottesville, Richmond, and Staunton***

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