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

- ☑ FREE annual review of your Estate Plan (30 minute private consultation). [Non-members pay $350+]
- ☑ FREE administrative changes (change a beneficiary, trustee, POA, etc.). [Non-members pay $500+]
- ☑ FREE Docubank subscription (24-hour online access to your medical documents). [Non-members pay $100+/yr]
- ☑ FREE phone calls to the firm regarding your Estate Plan.* [Non-members pay $175+]
- ☑ FREE legal assistance funding a trust with after-acquired or overlooked assets (filing fees extra).
- ☑ FREE guardianship advice– help your children protect your grandchildren. [Non-members pay $700+]
- ☑ FREE Advance Medical Directive (AMD) /Living Will for a family member. [Non-members pay $525]
- ☑ 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 executor and/or trustee upon death or disability of a client. [Non-members pay $350+]
- ☑ Discounted and guaranteed fee for estate administration upon death.
- ☑ Access to our trusted referral sources (financial planning, retirement/tax advice, insurance, business planning).
- ☑ Peace of mind knowing we're ensuring that life-changes are incorporated into your plan.

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

MEMBERSHIP IS JUST $495/YEAR.

RENEWAL INFORMATION IS MAILED IN DECEMBER FOR THE UPCOMING YEAR.

STAPLETON ELDER LAW

Guiding You Through The Journey Of Your Senior Years

Offices in Charlottesville, Richmond, and Staunton

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