

Benefits of the Legacy Assurance Plan

1. A lifetime of services and benefits designed to complement your plan and ensure that it remains up to date as well as future guidance in the case of a life-event
2. Certificate of Membership
3. Membership ID card
4. Customer Service Hotline
5. Professional oversight from an experienced partner with more than 35 years of experience and who has facilitated more than 40,000 estate plans.
6. One on one consultation
7. Gathering and organizing all relevant information for submission to an attorney
8. Access to a qualified estate planning attorney
 - a. Your attorney has been vetted for their background, experience, knowledge and has usually done hundreds if not thousands of estate plans over the course of their career.
 - b. They will tailor your estate plan to meet your specific goals and objectives.
 - c. Access to in- network discounts for legal services not included with the plan (i.e.; Corporations, LLC's, etc.)
9. Any and all estate planning documents necessary to meet member's estate planning objectives.
 - a. These may include but not limited to:
 - i. Wills
 - ii. Revocable Living Trusts
 - iii. Durable Powers of Attorney
 1. Health care
 2. Financial
 - iv. Living wills
 - v. End of life directives
 - vi. Deeds
 - vii. Other estate planning documents that may be necessary.
10. Document delivery, execution and notarization
11. Funding assistance
12. Review of beneficiary designations
13. Financial reviews with a financial professional
 - a. Provides advice and assistance with:
 - i. Income strategies
 - ii. Estate taxes
 - iii. Inheritance taxes
 - iv. Gift taxes
 - v. Long term care planning
 - vi. Nursing home expenses
 - vii. Funeral expenses
14. Periodic Financial reviews
 - a. Ensures that your plan stays up to date and fully funded.
15. Consultation with surviving spouse at death of first spouse, if applicable
 - a. Review and update plan if necessary
 - b. Review assets and income
16. Settlement guidance through an initial consultation with family after death
 - a. Provide necessary information and resources to successor
 - b. Assist with insurance and other financial issues
17. Access to Assured Care, our extended benefits program (included for the first year)
 - a. Protection against any future out-of-pocket expenses associated with maintaining your plan
 - b. Free document replacement for lost, stolen, or destroyed documents due to flood, tornado, and other acts of nature
 - c. Certain affidavits needed by your Personal Representative or Successor Trustee at estate settlement
 - d. Document delivery
 - e. Facilitation of notary and witnesses, if applicable, for document execution