

Trust Upkeep™ Program provided by the Offices of Richard J. Herndon, Attorney at Law

What is the Trust Upkeep™ Membership Program?

It is a program designed exclusively to help our clients get the most out of our legal services without incurring hourly billing. We have found that our clients want to feel they can call us if they have questions, or if they need a copy of a document that we have prepared, but may hesitate for fear of getting a bill. Also, we want to ensure that your estate plan is always current despite the constant changes in our economic, legal and political climate.

What is included in the Program? For an annual fee, we offer the following benefits and services as part of our Membership Program:

- Complete Trust Restatement every three years (provided we have drafted a Trust or Trusts for you since January 1, 2002). NOTE: This applies to Revocable Living Trusts, not to specialized trusts, such as IRA Protection trusts.
- \$995 *complete* Estate Plan update for members who have Trust Based Plans prepared prior to 2002.
- Free “Simple” Trust amendments
- Unlimited updates or replacements of General Durable Powers of Attorney, Health Care Powers of Attorney, HIPAA Authorizations, and Living Wills
- Free Telephone consultations on ANY legal matter. If the matter is beyond our expertise we will, at your option, refer you to an attorney who can handle your matter.
- 25% discount against our hourly rates on any non-estate planning matter that we handle for you. As of January 1, 2009, our “standard” hourly rate is \$225 per hour.
- Our exclusive, quarterly “members only” newsletter.
- Free annual review of your plan – which we *strongly recommend*. We will discuss your plan and changes in the law that might affect it.
- Free attendance at exclusive “members only” educational programs on various legal and financial topics, whether presented by our office or others.

- Free preparation of Deeds for newly acquired real estate, or for sales or transfers of real estate (Note: This applies to Missouri transactions only, and does not include recording fees).
- Unlimited Trust Funding and re-titling assistance.
- Free Docubank Health Care Data Service (at your option).
- Up to three \$200 discount coupons per year for a Trust Based Estate Plan that you may give to anyone (children, friends, other family members). Simply contact us when you wish for us to issue a coupon.
- Free copies of your existing Planning documents provided in Compact Disc (CD) format., or send via email at your instruction.

What will this cost? If you were to pay for the above services by hourly fee, you could expect a bill in excess of \$2,000. However, we believe that maintaining a long-term relationship with you and keeping your plan current is so important that we are offering our Program at a deeply discounted rate of \$295 per year for an individual and \$395 per year for a couple.

Please also note, *if you prepared a Trust Based Estate Plan through our office in 2008, your 2009 fees are waived*, but you still must return the form to sign up.

Why we recommend it. You took the time to visit with us about your future, and to make sure that your loved ones will be taken care of once you are gone. We want to make sure you are taken care of for the rest of your life. Unfortunately, the laws are constantly changing, and it's important that your plan reflects those changes. We want you to have the most current estate plan available, so that your intentions are carried out in the manner you choose.

If you have other questions about the program, please feel free to call. If you are ready to sign up, please fill out and return the enclosed Membership Agreement. We will mail the agreement back to you after it is signed, along with your membership kit. If for whatever reason you choose to not become a member we would appreciate hearing from you as to why you do not feel that this is the right thing for you to do.