

# PEACE *of* MIND Program

## MEMBER BENEFITS

We know there are times when you have a question regarding your estate planning and want to call without worrying about extra fees. We believe our Peace of Mind Maintenance Program removes this concern while ensuring your estate plan is well maintained. We offer the following services for a one year period for a fixed fee:

1. **Telephone Consultations** with a Russo Law Group, P.C. attorney or knowledgeable legal assistant who is under the supervision of an attorney regarding your estate plan and its maintenance.
2. **Annual Review** of changes in your life which affect your estate planning documents. We will send you an annual questionnaire and be available for a one hour meeting with one of our attorneys at no additional charge. This meeting may be transferred or gifted to a family member or friend.
3. **Sharefile** allows us to upload and maintain your key estate planning documents on a secured site with privacy settings. You will have 24/7 access to your documents.
4. **POM Summary Document Chart** detailing your executed planning documents which is kept up to date.
5. **POM Asset Chart** detailing your assets reported to us which is updated periodically.
6. **Updating your Agents named in your Advance Directives**, which were prepared by Russo Law Group, P.C., at no charge.
7. **Updating Your Estate Plan** with revised or new legal documents such as wills(s) and/or trust(s) which will be charged separately by the law firm with its fee being discounted by ten (10%) percent.
8. **Complimentary Meeting with a Care Consultant** to assess care needs and assist in making life care decisions including a home safety check.
9. **Cash Flow Analysis** of your income and expenses by a financial advisor at no additional charge.
10. **POM Alerts** during the year that focus on planning.
11. **Elder Law Update and Estate Planning Update** newsletters mailed to your home, as and when issued. This is in addition to the newsletter being available electronically to our clients.
12. **Review of Legal Matters** such as litigation and real estate without charge. If Russo Law Group, P.C. represents you, then a separate fee agreement will be necessary.
13. **Annual POM Appreciation Luncheon** exclusively for POM clients and your family and fiduciaries.
14. **Special Events** such as **Private Movie Showing** of a first run movie for you and your family and the **Thanksgiving Dinner**.

Please note that these benefits can only be realized with your active participation. We look forward to helping you fulfill the value of this program, so please contact us with any questions or concerns.

Revised: 08/2019