



Over \$2,500 in Instant Enrollment Bonuses

Bonus	Description	Value
Free Estate Check Up For Immediate Family	Free Estate Check Up For Immediate Family (parents, children, siblings) Who Have Less Than \$7 million if Married or Less Than \$3.5 million if Single	\$750
50% Off Plan for Immediate Family	50% Off Trust Plan (or Higher) for Your Immediate Family (parents, children, siblings). If Something Happens to Your Immediate Family, You May Very Well Have to Clean Up the Mess. Let Us Give You the Peace of Mind of Knowing There Won't Be a Mess	\$1,250+
Free Health Care Directive and Durable Power of Attorney	Free Health Care Directive and Durable Power of Attorney for Immediate Family (parents, children, siblings) Who Do Not Have Assets That Would Be Subject to Probate	\$500
No VIP Membership Enrollment Fee	Clients enrolling at the time of their Plan Presentation and Priceless Conversation meeting do not pay a VIP Membership Program enrollment fee. Clients enrolling later will pay a set up fee equal to 6 months of membership. Clients who cancel their membership and want to re-enroll later will be required to pay the set up fee at the time of re-enrollment plus an updating fee.	\$300+

FAMILY VIP MEMBERSHIP PROGRAMS

MEMBERSHIP BENEFITS	SAVINGS	LEGACY PLAN	BUSINESS PLAN	LIFE PLAN	TRUST PLAN
Annual Plan Review and Unlimited Plan Amendments Due to Life and Law Changes So Your Estate Plan Works When You Need it Most!	\$495+	Included	Included	Included	Included
Annual Review of Your Assets and Update of Your Family Wealth Inventory So Your Loved Ones Know What to Look For After You Are Gone and None of Your Assets End Up Part of Michigan's Unclaimed Property Division.	\$395	Included	Included	Included	Included
Call Your Personal Family Lawyer Before Making Any Legal or Financial Decisions. All Discussions at No Charge. Up to 3 "Lawyers Letters" Written On Your Behalf.	\$1000+	Included	Included	Included	Included
10%-50% Discount on Future Legal Services. If we can't help, we will pass on discounts to you from our Trusted Legal Advisors because we don't take referral fees.	\$1000+	Included	Included	Included	Included
Annual Priceless Conversation to Transition Your Most Important and Most Frequently Lost Family Wealth – Who You Are and What's Important to You.	\$395	Included	Included	Included	Included
Secure storage of your original Will and Guardianship nominations	Varies	Included	Included	Included	Included
Maintenance of Irrevocable Life Insurance Trust and Recordkeeping of All Gifts Into the Trust. So Your Insurance is Not Subject to Estate Tax At Your Death	\$1095	Included	n/a	Included	<p>For the family who wants to consult their own lawyer before making important legal or financial decisions or dealing with a personal conflict, wants their planning documents to always reflect their life, their assets and the law so loved ones have as easy a time as possible after they are gone, to ensure that assets will never be lost to the state and wants to leave a true Legacy Library so whole Family Wealth is captured and passed on instead of lost at each generation, investment is ONLY:</p>
Annual Reminders automatically sent to you so your irrevocable life insurance trust premiums are paid from the correct accounts, Crummey notices are issued and Trustee doesn't forget to carry out important duties on behalf of the Trust.	\$695	Included	n/a	Included	
Annual Meeting With Us and Updating of Your Corporate Records for Businesses Owned by You for Maximum Liability Protection. Monthly Investment Covers One Business; Additional Businesses At A Reduced Fee.	\$595	Included	Included	<p>For the person who has one or more Irrevocable Life Insurance Trusts and wants to ensure that gifts made into those trusts are excluded from estate and gift tax and wants to ensure planning documents work always, assets are never lost to the state and life insurance is never subject to estate tax, investment is ONLY:</p>	
Consult Your Personal Lawyer Before Making Any Business Decisions at No Charge. Like Having a General Counsel for Your Family Business.	\$1995+	Included	Included		
Annual In-Person Opportunity Capturing Meeting With Your Personal Family Lawyer, Your Tax Advisor, Your Financial Advisor and/or Your Children to Ensure Your Planning Decisions Remain In Force and Everyone is on the Same Page (you choose who to include)	\$995	Included	<p>For the person who wants to ensure entities stay up to date for maximum estate planning / asset protection and wants ongoing consultation to his or her Personal Family Lawyer without hourly fees as issues arise, investment is ONLY:</p>		
In the Event of Incapacity, Legal Documents are Prepared or Revised to Transition Fiduciary Responsibility to the Next Generation Quickly and Easily at No Charge. Pre-Administration Services.	\$1295	Included			
We will act as the Independent Trustee on your Asset Protection Trust for only \$100/mo per trust. Discounts for Multiple Trusts.	Varies	Plan By Invitation ONLY			
MONTHLY MEMBERSHIP INVESTMENT		\$249/mo.	\$149/mo.	\$99/mo.	\$49.95/mo.
TOTAL ANNUAL VALUE		\$9,500+	\$5,500+	\$4,500+	\$3,000+