

Process Podcast

Chapter 7 – Client Care

The final phase of the family estate legacy program is our client care program. As you might imagine, things change over time the tax laws change, wills and trusts law change your family dynamics change. So, with all these changes, you shouldn't stick your estate plan in a drawer and just forget about it. Rather, we have a program where every year we send you a written review of your plan.

We also sometimes meet with you. We have two levels of the client care program with the essential level and the elite level. The elite level contains an annual meeting. Again, we can include anyone that you want in this meeting, we can have your spouse, we can have your adult children, if you want, we can have your attorney that you've had a lifelong relationship with, we can invite your financial planner or CPA.

The nice thing about the elite level where we meet every year, is we make sure that everything remains in alignment, that your assets remain in alignment with your plan. If you've opened a new account, or you've purchased a new property, we want to make sure that it's titled correctly inside of your estate plan.

The client care program keeps things in an economical way up to date, and we also let you know if there's any been any changes to the tax laws trust laws, that would require a change to your trust. Many of the changes that you will have are included in the client care program and that, you will not pay extra for. So, the client care program is designed to make sure that your estate plan never falls out of date.

If you've already scheduled your initial consultation with us, we look forward to meeting you. If you haven't, please do give us a call and ask us to set that initial consultation where we will forward to you the initial client package. We look forward to seeing you soon.