

WAKEMAN LAW GROUP, INC.

Estate, Trust & Tax Attorneys
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Trust Maintenance Program

| STRUCTURE | SERVICE | FREQUENCY |
|--|---|------------------|
| Family Trust | Review trustees, specific bequests, manner of distribution to heirs, contingent beneficiaries | Annually |
| | Prepare trust amendments | Annually |
| | After 3 years, a 20% discount on legal fees for post death trust administration | As needed |
| Pour-over Wills | Review guardians (if any), executors, specific bequests | Annually |
| | Prepare codicils | Annually |
| Durable Powers of Attorney: Healthcare Asset Management | Confirm agent and successors | Annually |
| | Confirm agent and successors | Annually |
| | Prepare amendments | Annually |
| Assets: Real Property Other Transfers | Prepare Deeds | As needed |
| | Review bank accounts, investment accounts, partnership, LLC interests, closely held stock, etc. | As needed |
| Life Insurance Retirement Plans/IRAs | Confirm the beneficiary designations | As needed |
| | Supervise new designations | As needed |

The fee is One Thousand Dollars (\$1,000) per year (non-refundable) until cancelled in writing.

Accepted:

DATE

SIGNATURE

- Check payable to Wakeman Law Group, Inc. (Mail in the enclosed reply envelope)
- Payment by credit card - Visa/MasterCard/Amex/Discover (Complete and mail or fax)

Print Cardholder Name _____ Telephone: _____

Credit Card No. _____ Exp. Mo./Yr. _____