Family Wealth
PLANNING INSTITUTE

Over $4,000 in Free Enrollment Bonuses

Bonus	Description	Value
Free Estate Check Up For Parents Over 65	Free Estate Check Up For Parents Over 65 Who Have Less Than $4mm if Married or Less Than $2mm if Single	$950
50% Off Plan for Parents	50% Off Plan for Parents	$1995 or more
Free Health Care Directive and Durable Power of Attorney	Free Health Care Directive and Durable Power of Attorney for Adult Children Up to the Age of 25 and Parents Over the Age of 65 Who Do Not Have Probatable Assets	$495
Free Insurance Review	Free Comprehensive, Objective and Easy Insurance Review to Ensure Your Family is Properly Protected and You Are Not Spending More Than You Need to	$995
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 one year 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.	Varies

FAMILY WEALTH VIP MEMBERSHIP PROGRAMS

MEMBERSHIP BENEFITS	VALUE	LEGACY PLAN	LIFE PLAN	BUSINESS PLAN	TRUST PLAN
Annual Plan Review and **Unlimited Plan Amendments** Due to Life and Law Changes **So Your Plan Works – Always**!	$495	Included	Included	Included	Included
Ask Your Personal Family Lawyer Unlimited Legal or Financial Questions For Your Peace Of Mind. Call Us Anytime and Get Access to Our **Trusted Team of Legal Experts.** Many Pass on Discounted Fees Because We Do NOT Take a Referral Fee.	$995	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
Monthly Family Wealth Matters Audio CD mailed to your home. Each month, Alexis interviews experts who will increase your **Family Wealth, Health and Happiness**.	$395	Included	Included	Included	Included
Annual **Review of Your Assets and Update of Your Asset Spreadsheet** So Your Loved Ones Know What to Look For After You Are Gone and None of Your Assets End Up Part of the $5.2Billion Held by California's Unclaimed Property Division.	$395	Included	Included	Included	Included
50% Disc. On After Death Trust Administration – Your Loved Ones Will Thank You!	$1000s	Included	Included	Included	Included
10%-50% Discount on Future Legal Needs ... if it's a legal matter we can help with, we'll do so at 10% - 50% of our regular fees.	$1995	Included	Included	Included	Included
Annual **Meeting With Our Corporate Paralegal 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	Included	**For the family** who 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, that assets will never be lost to the state and they will leave a Legacy Library of priceless conversations so whole Family Wealth is captured and passed on and wants us to be here for legal guidance at ANY TIME, investment is ONLY:
California Corporations or Limited Liability Companies Formed for Only $497.	$995	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	$595	Included	Included	**For the business** owner who has a corporation that needs to be maintained for maximum protection from liability, wants to ensure estate plan documents always work, assets are never lost to the state and the corporation is maintained for maximum liability protection, investment is ONLY:	
Annual Assessment of Gifting Plan to Ensure You Don't Fail to Use Every Single Government Tax Gift, Which Could Mean Hundreds of Thousands for Your Loved Ones.	$495	Included	Included		
Annual Opportunity Capturing Meeting With Your Personal Family Lawyer, and Your Tax Advisor and/or Your Financial Advisor (you choose who to include)	$1495	Included	**For the person** who has one or more ILITs 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:		
Annual Family Meeting to Integrate Adult Children Into Planning and Prepare Them To Receive Wealth So Your Family Increases Its Wealth at Each Generation … Protect Against the Rags To Riches To Rags Phenomena	$995	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**			
TOTAL MINIMUM ANNUAL VALUE		**$12,000**	**$9,000**	**$8,000**	**$6,500**
MONTHLY MEMBERSHIP INVESTMENT		**$249.00**	**$149.00**	**$99.00**	**$49.95**