

FAMILY WEALTH VIP MEMBERSHIP PROGRAM AGREEMENT

Benefit Highlights Over \$4,000 in Free Enrollment Bonuses

Bonus	Description	Value
Free state 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 Probable 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 PROGRAM AGREEMENT

This Family Wealth VIP Membership Program Agreement (“Agreement”) is a contract between the undersigned individual(s) (“You” or “Member”) and [YOUR FIRM NAME], A Professional Corporation, having a place of business at [YOUR ADDRESS], and sets forth the terms of your membership in the Family Wealth VIP Membership Program (“VIP Program”). You must read, understand and agree to the terms and conditions of this Agreement and sign where indicated below before your membership in the VIP Program will become effective.

In consideration of the exchange of rights, obligations and benefits described herein, the parties hereby agree as follows:

1. Amendment to Engagement Agreement. This Agreement serves as an addendum to the Attorney Client Engagement Agreement, dated _____, entered into between you and (FIRM NAME) (the “Engagement Agreement”). Together, the two documents constitute the entirety of the agreement between you and (FIRM NAME). In the event there is any conflict or inconsistency between the terms hereof and the terms of the Engagement Agreement, the terms of the Engagement Agreement shall govern.

2. Term, Termination & Renewal. The minimum financial commitment to the VIP Program is one (1) year, and by signing this Agreement, you agree to pay the Membership Fee for twelve (12) consecutive months, regardless of the extent and scope of your use of VIP Program services. A significant portion of the VIP Program membership includes benefits that are paid by [FIRM NAME] in the first months of your membership, thus mandating the one year financial commitment by the member. This also gives the members the flexibility to utilize the benefits upfront in the first month or several months, without paying the cost of those services upfront, but rather over the one year term of membership. While you are free at anytime to terminate the attorney-client relationship with [FIRM NAME], or your VIP Program membership, your one year financial commitment remains an obligation.

Following the initial one year term, the Agreement will automatically renew on a monthly basis unless you notify us in writing of your intention to terminate. The initial one year term and any renewal terms hereunder are referred to herein as the “Term.”

Upon termination of your VIP Program membership, for any reason, there will be no refunds given.

If you terminate your membership in the VIP Program, you thereby forego the right to receive the specific, exclusive benefits offered to members of the VIP Program. You may elect, however, to still remain a client of [FIRM NAME] pursuant to the terms of the Engagement Agreement, and continue to receive advice, consultation, and services pursuant to the terms of the Engagement Agreement.

3. Fees and Payment Terms. The annual VIP Program Membership Fees for each level are set forth on Schedule 1. If you to join the VIP Program six (6) months or less after your Plan Presentation Meeting, all enrollment fees are waived.

If you elect to join the VIP Program six (6) months or more after your Plan Presentation Meeting, you will be charged a fee in an amount equal to the applicable monthly membership fee times the number of months since the date of the Plan Presentation Meeting (“Enrollment and Updating Fee”).

Your first monthly Membership Fee as set forth in Schedule 1 is due in full upon execution of this Agreement. You agree to provide a valid credit card number at the end of this Agreement, and you authorize [FIRM NAME] to charge the applicable monthly fee to such account on a monthly basis during the Term.

If you do not pay the Membership fee within thirty (30) days of the due date for said fee, your membership will automatically terminate. Any benefits or bonuses provided for under the VIP Program will be automatically terminated, and [FIRM NAME] is not responsible for any liability that may arise due to any benefits or bonuses that are discontinued. If you terminate your membership and want to re-enroll later, [FIRM NAME] reserves the right to charge the Enrollment and Updating Fee at the time of re-enrollment.

4. VIP Membership Requirements. To be eligible to participate in the VIP Program, you must meet the following criteria and continue to meet these criteria throughout the Term: (i) you must have executed an Engagement Agreement with [FIRM NAME]; (ii) you must pay the required monthly Membership Fee; (iii) you must provide [FIRM NAME] with current and valid contact information, including your legal name, address, and telephone number and email address and promptly update all such information should it change; (iv) you must provide timely updates with regard to any material changes in your assets; and (v) you must continue to provide and update all relevant contact information, including that of your trustees, guardians, health care agents and other important individuals named in your plan.

5. VIP Membership Benefits. During the Term of the Agreement, you will be eligible to receive all VIP Program benefits afforded to all VIP Program members for your particular Plan. The four Plan levels (Legacy Plan, Life Plan, Business Plan, Trust Plan) are described on Schedule 1 attached hereto. Membership in the VIP Program is intended as a supplement to the estate planning services provided to you by [FIRM NAME], to assist you to maintain your estate plan as your needs, the law and other factors may change, as well as to provide you with educational resources.

6. Limitations. Services provided within the VIP Program are limited to revision and maintenance of your original planning documents. For example, amendments provided at no charge under the VIP Program does not include the creation of an entirely new trust, adding additional trusts, or changes to the type of trust established. Those services would be provided at an additional cost, if desired. Examples of included services are changes to trustees, changes to amounts of distributions, changes to the beneficiaries name and similar types of changes and elections. [FIRM NAME] is not responsible for failure to recommend any amendments or modifications to the current Plan that may cause any liability for estate taxes or any other matters falling outside the scope of your engagement with [FIRM NAME].

7. Compliance with Law. You agree to comply with all of your local, state, province, country or regional legal restrictions that may be applicable to your participation in the VIP Program. You acknowledge that [FIRM NAME] is not responsible for making amendments to comply with changes in the law arising after the date your plan documents were created unless you attend any and all review meetings offered by [FIRM NAME] and accept [FIRM NAME] recommendations for amendments to your plan documents.

8. Referrals to Other Services. As a part of your participation in the VIP Program, in some instances, [FIRM NAME] may refer you to outside service providers. [FIRM NAME] does not accept referral fees from third parties in exchange for such introductions. Your relationship with other professionals or third party service providers that you may meet or come into contact with as a result of your VIP Program Membership are solely between you and such parties. You understand and agree that [FIRM NAME] does not endorse, recommend, authenticate, or warrant any product, offer, or service offered by any such third party.

9. Modification. [FIRM NAME] may amend its policies and/or the terms of this Agreement from time to time following reasonable notice to you.

10. Governing Law. This Agreement is governed by the laws of the United States of America and the State of [YOUR STATE], exclusive of such state's rules with regard to choice of law.

11. Disputes and Arbitration. We look forward to a long and mutually productive relationship with you. If you become dissatisfied for any reason, we encourage you to bring that to our attention immediately. It is our belief that most such problems can be resolved by good faith discussions between the parties. Nevertheless, it is always possible that some dispute may arise which cannot be resolved by discussions between us. We believe that such disputes can be resolved more expeditiously and with less expense to all concerned by binding arbitration than by court proceedings. As such, any dispute arising hereunder shall be subject to arbitration in accordance with the terms of this paragraph. Any dispute, controversy or claim arising out of or relating to this Agreement, including any claims for legal malpractice, breach of contract, breach of fiduciary duty, and/or other claims relating to the provision of professional services, shall be settled by binding

arbitration administered by the American Arbitration Association in accordance with its applicable rules. By agreeing to submit this matter to binding arbitration, you are waiving your right to a jury and any rights to appellate relief. If you have any questions regarding the waiver of these rights, we urge you to consult with another attorney of your choice. Any judgment on the arbitration award rendered by the arbitrator(s) may be entered in any court having jurisdiction. The arbitration proceeding shall be held in Los Angeles County. Any dispute relating to fees, costs or legal expenses in dispute, including any action to collect monies owed, is subject to the arbitration procedure established by the State Bar and codified at California Business and Professions Code section 6200 et seq. Any action relating to such a fee dispute shall be conducted in conformity with that statute, notwithstanding the fact that the parties may agree to binding arbitration of such fee disputes after the statutory obligations are met or otherwise consistent with the statutory scheme.

Program Level Selection:

Please select from the following four Plan levels, as described on Schedule 1: (please check one)

- Legacy Plan Life Plan Business Plan Trust Plan

Membership Fees Reminder:

As noted above, membership in the Family Wealth VIP Program requires a minimum one year commitment. Your membership in the VIP Program will be billed monthly to the credit card you list below at the appropriate rate for the membership level you select.

Credit Card: (check one) <input type="checkbox"/> VISA <input type="checkbox"/> MC <input type="checkbox"/> AMEX <input type="checkbox"/> Annual \$_____ <input type="checkbox"/> Monthly \$_____
Card Number: _____ Exp. Date: _____
Name on the Card: _____
Billing Address: _____

Accepted and agreed to on _____.

NAME SIGNED

NAME SIGNED

NAME PRINTED

NAME PRINTED

[YOUR FIRM NAME]

By : _____
[YOUR NAME]

Thank you. Please fax the signed agreement to [YOUR FAX NUMBER], attn: [YOUR CSD]

Schedule 1

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 Lift Your Life Audio CD mailed to your home. Each month, Alexis interviews experts who will empower you to uplevel your life and your business	\$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	<p>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:</p>
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	<p>For the business owner who has a corporation that needs to</p>	

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	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 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 VALUE		\$11,435	\$8,945	\$7,855	\$6,265
MONTHLY MEMBERSHIP INVESTMENT		\$249.00	\$149.00	\$99.00	\$49.95