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EVERGREEN LEGACY PROGRAM OVERVIEW

We have found that without an intentional continuing engagement to keep an estate plan up to date, plans that were initially well designed often fall short of their intended goals. The Evergreen Legacy Program is intended to ensure that the strategies we implement for you are successfully managed and maintained over time, especially when it matters most. Lots of things happen from time to time that threaten the success of a strategy. These often include:

- The birth, disability, or death of a loved one;
- Other unexpected changes in the lives of beneficiaries;
- Significant changes in wealth or the composition of assets;
- Changes in your priorities over time;
- Changes in federal or state laws that impact your plan;
- New opportunities that open up under the laws of other jurisdictions; or
- New strategies that emerge to create opportunities for better planning outcomes.

The Evergreen Legacy Program helps keep us in regular communication with you so that when important issues arise we can be proactive and help your plan stay current. We've found that people who keep their planning top of mind are the most informed and comfortable with their planning, and their strategies are among the most successful.

The linchpin of the Evergreen Legacy Program is open communication. Generally speaking, this is what that means:

- No charge for calls or emails. Unless we're hired for a matter not covered by the original engagement we will never bill you for our telephone time or for time responding to emails. Feel free to ask questions, share ideas, or express your concerns about your planning without fear of receiving an unexpected bill.
- Help with property transfers. Trusts and other entities can be confusing, and they don't work very well if your property isn't titled correctly. We gladly answer questions about transferring property and how it impacts your plan. Simple asset transfers are covered under our Legacy Program. More complex or time consuming transfers may require a separate engagement.
- Regular planning reviews. We will schedule regular meetings with you either in person or by video conference to review your plan with you. Feel free to invite your children, other

loved ones or decision makers, and any advisors you'd like to include. We will review the roles and responsibilities of the people involved in the strategy, and we'll look at how your assets are titled. (See funding discussion, above.) We will identify any necessary or recommended changes and address them. Simple changes are typically provided at no additional charge. More comprehensive changes may require a separate engagement.

- Periodic refresh of powers of attorney and medical documents. Although these documents don't usually "expire," we've found that some financial institutions or medical providers don't like documents that are more than a few years old.
- Maintaining medical powers using LegalDirectives®. We will provide continued online and accessible storage of your medical powers of attorney, HIPAA authorizations, and Advance Directives through the LegalDirectives® service.
- Additional electronic copies of your plan documents as needed.

Sometimes major changes are necessary to keep a plan up to date. Some of the services we provide that are not included in the Evergreen Legacy Program include:

- Major strategy changes due to significant changes in the law. This might be a new tax act from Washington or other major state or federal legislation that affects the core design of your plan. Major changes will require a new engagement.
- New strategies. This might include starting a new business, adding one or more strategies to complement your original plan, or other matters that expand our original scope of work. We will gladly assist you with those matters under a new engagement agreement.
- Fiduciary services. We occasionally serve as trustee for trusts or in other fiduciary capacities. We are ethically obligated to follow additional steps before undertaking those duties but may be able to do so under a separate engagement agreement.
- Federal estate, or gift & GST tax returns. If you or your trustee would like our help with preparing these returns, will gladly help under a separate engagement agreement.
- Trust administration services. If you become incapacitated and after you pass away, your trustee has legal responsibilities under state law and as outlined in the trust. If your trustee needs our assistance or guidance, we will be honored to help under a separate engagement.

We don't provide "one-size-fits-all" legal services, so we usually tailor our Legacy Program to your special circumstances. As a result, the pricing for enrollment in the Evergreen Legacy Program depends on the nature of the plan. Please contact us to learn more.