



Concierge Care Program Benefits

We at the Legacy Elder Law Center (LELC) strive to forge solid, long-lasting relationships with our clients. As part of this commitment, we offer all of our clients the opportunity to enroll in our exclusive Concierge Care Program to ensure that (i) you retain access to your lawyer and an ongoing attorney-client relationship, (ii) you remain informed of changes in the law that may affect you, and (iii) your plan remains up-to-date. Membership in the Concierge Care Program entitles you to the following:

1. On ongoing attorney-client relationship with the Legacy Elder Law Center and assurance that we will be unavailable to potential clients who may be adverse to you.
2. Notification of changes in the law that could affect your Legacy Elder Law Center created estate and asset protection plan.
3. Unlimited Complimentary telephone and email consultations with our staff regarding your Legacy Elder Law Center created estate and asset protection plan and the retitling of your assets.
4. Regular restatement your core planning documents, listed below, if any, to reflect changes in the law and the state of the art, if the client retains capacity. When you re-enroll in the CCP there is a three-year rotation to restate your core documents. Your restatements will be created during the 11th or 12th month of your renewal period.
 - ◇ **First Year of Renewal** – Your Advanced Medical Directive(s) and Durable Healthcare Power(s) of Attorney.
 - ◇ **Second Year of Renewal** – Your Durable General Power(s) of Attorney.
 - ◇ **Third Year of Renewal** – Your Revocable Living Trust.
5. The right to schedule one complimentary, in-person consultation per renewal period to:
 - ◇ Have the Legacy Elder Law Center assist you in signing your restated documents, and/or
 - ◇ Address any questions or concerns you may have about your Legacy Elder Law Center created estate and asset protection plan and the retitling of your assets.
6. Complimentary telephone or in-person consultations to discuss options in the event of a family member becomes incapacitated, needs immediate long-term care assistance, or dies.
7. Ten (10) percent discount on all services provided by our firm. (Excluding any CCP Renewal).
8. Special pricing available to upgrade the level of your Legacy Elder Law Center created estate or asset protection plan or to prepare, file, and prosecute an ABD Medicaid application.
9. Unlimited Complimentary Notary services.
10. Unlimited participation in any Legacy Elder Law Center exclusive education programs that may be offered during your enrollment.

We believe the Concierge Care Program is very important for the peace of mind and well-being of our valued clients. After any complimentary first year that may come with your Legacy Elder Law Center created estate or asset protection plan, your membership costs only \$1200 per year—significantly less than you might pay for the Program’s valuable services separately on an hourly basis. You will enjoy the peace of mind that comes with membership and knowing your plan is up-to-date. Specific rights, terms, and conditions apply, as stated below.

Your rights, terms and conditions:

1. You may cancel your membership in the CCP at any time with written notice and receive a prorated refund of your advance fee deposit as provided herein.

2. The scope of LELC's representation of you hereunder is strictly limited to those services expressly set forth in Concierge Care Program Benefits description.

3. You enroll in the CCP by paying a refundable advance fee deposit of \$1,200 which will be deposited and maintained in our attorney trust account, in your name, until earned by us or refunded to you, as the case may be. Your CCP membership will expire on the last day of the month that is twelve (12) months from the date of enrollment unless it is longer-extended or earlier-terminated as provided herein.

4. Beginning on the last day of the month following the date of enrollment, we agree that LELC shall have earned 1/12th of the advance fee deposit, that that fee is reasonable, and that LELC shall be entitled to deduct the earned monthly installment from the funds held in your trust account.

5. You agree that LELC may terminate your CCP representation at any time with written notice and receive a prorated refund of your advance fee deposit as provided herein.

6. If your enrollment is terminated for any reason, LELC shall refund to you the unearned portion of your advance fee deposit held in your trust account; provided, however, that you agree that LELC shall have earned as its fee a prorated portion of the then-current monthly installment calculated on a daily basis. You may ask for clarification on the fee arrangement and your right to terminate and receive a refund under this program at any time.

7. Additional costs incurred by the firm, such as recordation and filing fees, overnight delivery, accounting fees or expenses may be billed separately at our actual cost.

8. While the CCP does not cover complimentary consultations for clients prosecuting Medicaid applications or Medicaid renewal applications on their own, we may agree to provide such services, or any other LELC service, under a separate, written representation agreement.

9. You authorize auto-renewal by your method of payment on the 10th day of the last month of your annual membership. You may cancel auto-renewal of your annual CCP membership at any time at least one full business day before the date of your auto-renewal by sending a "Notice of Cancellation of Auto-Renewal" by email to info@legacyelderlaw.com.

10. While your right to terminate this representation and receive a refund, as provided herein, will never change, the other benefits, terms, and condition change at LELC's sole discretion upon written notice to you.

11. Please contact us a month or two before the termination date of your CCP to schedule your next Annual In-Person Consultation.

We appreciate the continued opportunity to be of service.