



PLANS FOR LIFE PROGRAM

“And Built a Bridge to Span the Tide”



As part of your planning fee, you are entitled to membership in our Plans For Life Program. If you wonder why we do this, we want to provide you with a plan that works for you, not only for the moment...but ALWAYS.

INITIAL AND CONTINUOUS FUNDING OF ASSETS

Our firm helps you with the initial funding of assets into your trust. We continuously review your assets with you and provide an annual report of your assets to ensure that all of your assets are properly funded into your trust.

ANNUAL REVIEW OF ESTATE PLAN

Every year, our firm will review your estate plan to ensure your plan is up to date. This ongoing process will provide you with piece of mind that things will be taken care of when you're gone. Just as your life changes, the law changes as well. If your situation changes or circumstances make it necessary to amend or update your estate plan, our firm will initiate those changes (subject to additional fees).

BRIDGEBUILDER FAMILY CARE MEETING

The BridgeBuilder Family Care Meeting allows an opportunity for you to meet and explain your plan to your trusted family members and advisors who will execute your plan and address questions and discuss any potential issues.

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ONGOING COMMUNICATION WITH OUR FIRM

The team members of our firm are readily available to answer any of your questions or concerns at any time.

We also provide clients with quarterly newsletters.

COUNSEL YOU ON MATTERS INVOLVING YOUR ESTATE PLAN

Our firm is available to counsel you on matters involving your estate plan, as well as additional planning options as your personal and financial circumstances change.

COLLABORATE WITH YOUR FINANCIAL ADVISORS, ACCOUNTANTS & INSURANCE PROFESSIONALS

Our firm collaborates with your financial advisors, accountants and insurance professionals in order to properly integrate your estate plan with your life.

ANNUAL PRICELESS CONVERSATION

Annual Priceless Conversation to transition your most important and most frequently lost family wealth - who you are and what's important to you (subject to additional fees).

DISCOUNT ON OUR FEES

Discount on our fees for advising your loved after you're gone.