

\$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	\$950
25% Off Plan for Parents	25% Off Plan for	\$19
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	\$497
Free Insurance Review	Free Comprehensive, Objective and Easy Insurance Review to Ensure Your Family is Properly Protected and You Are Not	\$997
No VIP Membership Enrollment Fee	Clients enrolling at the time of their Plan Presentation and 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	Varies

FAMILY WEALTH VIP MEMBERSHIP PROGRAMS

MEMBERSHIP BENEFITS	VALUE	LEGACY PLAN	WEALTH PLAN PLU	WEALTH PLAN	TRUST PLAN
Annual Plan Review and Unlimited Plan Amendments Due to Life and Law Changes	\$497	Included	Included	Included	Included
Unlimited Legal or Financial Questions For Your Peace Of Mind. Call Us Anytime For Free And Get Access to Our Trusted Team of Legal Experts – Hand-Picked By Your Personal Family Lawyer. Many Pass on Discounted Fees Because We Do NOT Take a Referral Fee.	\$997	Included	Included	Included	Included
Annual Priceless Conversation to Transition Your Most Important and Most Frequently Lost Family	\$397	Included	Included	Included	Included
Substantial Discount on Our Fees for Advising Your Loved Ones After You're Gone	\$997 or more	Included	Included	Included	Included
Monthly Family Wealth Matters Audio Program Mailed to You On CD So You Can Listen in Your Car, While You're Exercising or Anywhere at All	\$97	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 \$2.4 Billion Held by Massachusetts's Unclaimed Property Division.	\$1495	Included	Included	Included	VALUE: \$2,888
Unlimited Future Asset Transfers Acquired Post-Planning So You Never Have to Worry – We'll Take Care of It, Just Let Us	\$1495	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.	\$597	Included	Included	VALUE: \$4,480	
Massachusetts Corporations or Limited Liability Companies Formed for a Flat Fee of Only \$997 per entity formed.	\$1525	Included	Included		
Documentation of Gifts Made and All Record-Keeping of Gifts So That Estate Tax is Minimized and You	\$597	Included	Included		
Annual Assessment of Gifting Plan to Ensure You Don't Fail to Use Every Single Government Tax Gift, Which Could Mean Hundreds of Thousands in Your Loved Ones Bank Accounts.	\$497	Included	VALUE: \$7,168		
Annual Opportunity Capturing Meeting With Your Personal Family Lawyer, and Your Tax Advisor and/or Your Financial Advisor (you choose who to include)	\$997	Included			
Objective, Private Strategic Life Planning Session Facilitated By Your Personal Family Lawyer	\$1497	Included			
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	\$997	Included			
We will act as the Independent Trustee on your Asset Protection Trust for only \$100/mo per trust.	Varies	VALUE: \$10,659			
MEMBERSHIP PRICE		\$249/MONTH	\$149/MONTH	\$99/MONTH	\$49.95/MONTH

