THE RACK LAW FIRM, P.C.
A PROFESSIONAL LAW CORPORATION

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Estate Steward Program ©

Estate Planning is more an ongoing process than a completed project, since family and financial circumstances are always in a state of change. In order to reap the full benefit of the time and effort which you have expended to reach the point of implementing your current estate planning documents, it is advisable to examine those documents in the context of your changing circumstances on a regular basis. This review is especially important whenever Congress and the Virginia General Assembly step in to change our assumptions regarding legal and tax matters affecting your plan.

In an effort to provide a structure for this routine check-up, we have established the Estate Steward Program ("ESP") for clients of The Rack Law Firm, P.C. as a method of enabling you to be good stewards of your legacy to your family. The Program includes an annual consultation with us to review your estate planning documents and your current assets for accuracy and consistency, such as IRA beneficiary designations, successor trustees, and title to assets in the name of the proper trustee. We also take this opportunity to ask about any pending or completed transactions (for example, gifts of family business stock to the grandchildren) in order to identify the need for legal and tax counsel.

By enrolling in the Estate Steward Program, you become a member of a select list of clients whom we commit to providing additional counsel and advisory services which we could not possibly give to all clients. These featured services are as follows:

- Annual Estate Plan Review Consultation
- Updated Asset Title Matrix
- 10% Discount (up to $225) on Legal Fees During ESP Enrollment
- Estate and Tax Legislation Alerts
- Estate Planning *e-Legals*
- Quarterly Firm Newsletter

The annual fee for the Estate Steward Program is $450, payable in December preceding the enrollment year, or by the end of the following January. The annual consultation meeting can be scheduled any time between January 1 and November 1. We will send ESP members a renewal invoice in December to allow for a timely, automatic renewal of your enrollment (this also serves as a reminder to add the annual consultation to the New Year's Resolution list).

The attorneys, paralegals and staff of The Rack Law Firm, P.C. thank you sincerely for the opportunity to serve as your estate planning counsel, and we hope to enhance that relationship with the benefits provided to our Estate Steward Program clients.