



STRAHMLAWGROUP

WEALTH PRESERVATION · ESTATE PLANNING · ELDER LAW

15405 SW 116TH AVENUE, SUITE 112
KING CITY, OREGON 97224-4103
TEL (503) 639-8800

SCOTT L. STRAHM
ATTORNEY AT LAW

LICENSED IN OREGON & WASHINGTON

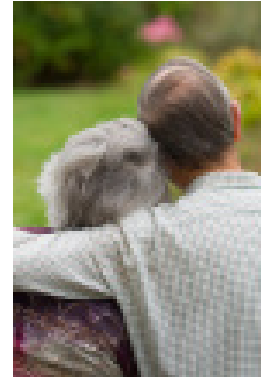
CLIENT MAINTENANCE PROGRAM

M

MAINTAINING YOUR ESTATE PLAN

In life, change is the one constant and is inevitable. Common changes may include changes in your:

- Family Relationships
- Health
- Tax Laws
- Finances (including asset ownership).



Just as clients should meet at least annually with their financial advisor, clients should also review their estate plan (including asset ownership) at least annually. We make it easy for you to keep your estate plan current. For an annual membership fee, our Client Maintenance Program entitles you to the following services:

- ❖ Reasonable phone calls by you or your advisors regarding your trusts to Strahm Law Group in our office at no charge;
- ❖ Minor amendments to your legal instruments such as word processing changes, trustee and agent updates;
- ❖ Specialized workshops offered throughout the year;
- ❖ Membership in our service which provides 24/7 availability of your healthcare documents using a wallet card;
- ❖ 50% discount on enhanced medical directives during membership year 1 for each of your children living in Oregon;
- ❖ Annual verification of proper titling for assets acquired during the membership year upon request;
- ❖ An annual update letter & a one hour annual review of your plan upon request;
- ❖ The Wealth Counselor newsletter

The annual membership fee of **\$325.00 and up for 2009** is paid after signing and is earned pro-rata over the following twelve months beginning the first of the month after signing. Clients participating in the Client Maintenance Program will be automatically billed the annual membership fee as part of our regular billing cycle. You may terminate participation in the Client Maintenance Program by notifying us in writing within 30 days of the receipt of the annual fee invoice. Clients wishing to enroll in our Client Maintenance Program who have not hired us for trust funding may only enroll upon full demonstration that all current assets to date have been fully and appropriately funded to their trust(s).