

Estate Planning Maintenance Program



Ongoing Protection that Evolves with You, Your Family, and
Your Assets — Giving You Confidence for What Comes Next

.....
70%

of Estate Plans
Fail to Achieve
Their Goals
.....

Estate planning is not a one-time event. As your life changes, your plan should change with it. Changes in your family, health, assets, and laws all impact whether your estate plan still works the way you intend.

The **Estate Planning Maintenance Program** helps ensure your plan remains current and aligned with your goals through every stage of life with regular reviews, proactive guidance, and ongoing access to our estate planning team.

What Your Program Includes



Annual Plan Review



Basic Document Revisions &
Amendments to Ancillaries



Family Care Commitment



Trust Funding Review
& Support



Members-Only Legal
Hotline



Exclusive Member
Resources

Ready to stay protected as life changes? Contact our team to enroll today.

901.388.5805 | contact@douglassrunger.com | www.douglassrunger.com

A Closer Look at Your Program Benefits



Annual Plan Review

- 30 minutes with Estate Planning Concierge
- 30 minutes with Estate Planning Attorney
- Covers life & asset changes, funding, fiduciaries & agents, law & tax updates, and plan goals



Basic Document Revisions & Amendments to Ancillaries

- Revisions include:
 - Clerical edits to Trusts
 - Replacing fiduciaries (Trustees, PRs, POAs)
- Amendments include:
 - POAs
 - Advance or Healthcare Directives



Family Care Commitment & Fiduciary Support

- Priority Family Support Meeting within 72 business hours of notice that a spouse/partner, fiduciary, trustee, or estate planning beneficiary passed away
- Guidance for Successor Trustees
- Complimentary POAs for adult children between the ages of 18-25



Trust Funding Review & Support

- Coordination with financial institutions for beneficiary designations
- Funding checklist and asset verification
- One new Tennessee real estate deed per year



Members-Only Legal Hotline

- Email or call for direct access to our estate planning team with any plan questions or notice of a major life change
- Unlimited access to our Concierge team
- One complimentary hour of attorney consultation per year



Exclusive Member Resources

- Educational & planning workshops, resources, and guides
- Notifications about tax & law updates
- Community-building events

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Frequently Asked Questions

How much does the Maintenance Program cost?

Introductory pricing starts at \$1,297.00 per year, billed annually.

What changes are not included in the Maintenance Program?

The program covers routine updates and ongoing support to help keep your existing estate plan up-to-date. It does not include the preparation of a new estate plan or substantial revisions that effectively require redesigning your plan. Certain services, third-party expenses, or time beyond the plan's included support may involve additional fees, but you will always be informed of and approve any additional costs in advance.

Can I customize the program to include only the services I need?

Not at this time. Since this is a new offering, we designed the program to include the services we've found are most important for keeping an estate plan current and effective.

What happens during the annual review meeting?

Your annual review takes place shortly after you enroll and then each year around the same time. We review your estate plan in advance so the meeting is productive and focused. You'll first meet with a member of our Concierge team to confirm funding and discuss any life or financial changes, followed by time with an attorney who will answer any questions you may have and recommend updates to keep your plan aligned with your goals.

Can my family members attend the annual review meeting?

Yes, but we will only meet with your family members with your express prior approval and written consent. The details of how this would work can be discussed with our Concierge team.

When should I contact the firm between reviews?

You should reach out to our Concierge team anytime you have questions about your estate plan or you experience a major life change. Examples include marriage, divorce, the birth or adoption of a child, significant changes in your assets, or any other event that might affect your wishes.

How do I get started?

Use the contact details below to book your consultation. We'll review your current documents, explain the program in detail, and get you enrolled so your estate plan stays current and aligned with your goals.

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