

## Borchers Law *PlanCheck*<sup>TM</sup> Program

We have recommended that you join our *Plan Check*<sup>TM</sup> Program the purpose of which is to: (1) help keep you informed regarding developments in the law and in legal practice and strategies, (2) to maintain our information and understanding of your circumstances and goals, (3) to provide diagnosis and detection of legal issues requiring attention, and (4) to recommend adjustments to your plan to achieve your objectives.

When you are enrolled in *PlanCheck*<sup>TM</sup>, Borchers Law will:

- (1) Answer your questions related to your estate plan at any time during the year under our “ten minute” rule on calls and emails from plan members, at no charge. The “**ten minute rule**” applies to four quick calls a year from you, your family members or advisors concerning your affairs.
- (2) Advise regarding funding your estate plan (how to take title to assets and regarding the transfer of assets to your trust(s), or other entities in your plan), as questions arise.
- (3) Every third year (2015 and every third year thereafter as long as you are enrolled in the plan in good standing):
  - Review your family, financial and legal matters in a 30 minute conference or phone call, including:
  - Determine whether any changes or additions to your estate plan are appropriate as a result of changes in circumstances, law, or procedures and practices.
  - Review your Asset Trust Organizer<sup>TM</sup> with you and confirm or instruct on funding, and discuss the basics of your plan.
    - We will schedule the third year meeting or conference call with you in the period from January through February in **2015** plan in good standing. You must prepare for that meeting, as we instruct you, in order to get the most out of it.
- (4) Offer you other benefits, including workshops and complimentary will storage.
- (5) Provide 10% off many future services of the firm you engage us for. and reduced fees in Tim Borchers serving as administrative trustee, estate settlement, and estate planning for the next generation where we can, provided you are continually enrolled in PlanCheck<sup>TM</sup> or another Borchers Law annual maintenance program.
- (6) Provide *ClientDocx*, a web-based document storage and remote access system for clients, selected family and advisors, from year-to-year as the firm is enrolled in that service and it is provided to its clients.

You may need additional maintenance services in future years that will be better covered by our *Estate Protection Review and Refinement*<sup>TM</sup> (“R&R”), *ILITServe*<sup>TM</sup> or *PlanServe*<sup>TM</sup> Programs.

**In years two and three of the three-year cycle, the fee is \$100/year, chargeable to a credit card during January.** If you wish to pay by check, then the fee for years two and three is \$200 paid at the start of the program (i.e., at this time). **In subsequent three year cycles, the annual fee will be charged to a credit card, or if you do not have a current credit card on file with us, then the fee for the three year cycle will be paid at that time in the month of January. All payments are nonrefundable for any reason. These terms may be changed by Borchers Law without notice.**

I have read the foregoing terms and agree to them. X \_\_\_\_\_ date: \_\_\_\_\_

**The credit card to put on file for you and to charge \$120 in years 2013 and 2014 is: Card type \_\_\_\_\_ card number \_\_\_\_\_ and [present] expiration date \_\_\_\_/\_\_\_\_.**

X \_\_\_\_\_  
Card holder's signature