

JM LAW  PLLC

CARES

LEGACY PLAN MAINTENANCE

We know that you work hard to take care of your family and your loved ones. Part of protecting your loved ones and your legacy is anticipating change. JM LAW CARES, our client estate and legacy planning maintenance program, is the best way to be proactive and adapt your plan to changes in estate and tax laws and regulations, your health, and your family dynamics.

WITH JM LAW CARES:

We COLLABORATE

We work hand-in-hand with you and your trusted advisors to design a customized plan that is tailored to fit you, your loved ones, and your legacy.

We're ACCESSIBLE

Our team is available when you need us – and you won't be charged for phone calls or emails related to your estate plan. JM LAW CARES members receive priority access to our legal team.

We REASSESS

Your annual CARES review meeting helps keep your legacy plan up-to-date.

We EDUCATE

We educate our clients on the changes to estate laws, regulations, and strategies, so your plan is sure to meet your needs.

We provide a SYSTEM

We have an efficient system in place to administer your trusts and estate upon death or disability.



THE FEATURES OF JM LAW CARES

- **Annual review** with one of our attorneys. To ensure the best care possible for yourself and your loved ones, we recommend an annual review of your estate plan to incorporate updates of estate and tax laws, changes to your health or family dynamics, and new legal strategies or enhancements to protect your legacy.
- **Funding guidance.** Our legal team will guide you through how to quickly and efficiently transfer the titles of your assets to your trust and make the appropriate beneficiary designations so that your trust functions precisely as designed.
- **Trust amendments to change your trustees or beneficiaries.** We understand that circumstances change. If you would like to update the person responsible for administering a trust or who will receive assets, we will make those changes to your estate plan.
- **Financial and medical powers of attorney.** After your annual review, when necessary, we will prepare new financial and medical powers of attorney to ensure that they are up-to-date in the event of a crisis.
- **Free notary service.** We are here to help—and will notarize any documents you need during business hours.
- **Family CARES meeting.** It can be challenging to initiate a conversation with your family members. We will facilitate a family summit—or a summit with you and your trusted advisors—so that every person understands their responsibilities to the extent you would like. We will address questions and concerns to help prevent any possible conflicts between beneficiaries and trustees.
- **No-cost initial consultation with trustees.** One of our attorneys will lead a consultation with your successor trustees to outline their roles and to help ensure that your plans are put in motion and your legacy is protected.

JM LAW CARES members will also receive priority access to our legal team.

So that we may serve you best, only current clients of JM LAW, PLLC who have completed their estate planning documents with us may participate in the JM LAW CARES program. Those who are not JM LAW CARES members will be charged the fees listed on our annual rate sheet for all interactions with our legal team.

We look forward to welcoming you as a member of our JM LAW CARES client estate and legacy planning maintenance program.

CONTACT US:



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