NW LEGACY LAW CLIENT CARE PROGRAM OVERVIEW OF BENEFITS

The Client Care Program provides peace of mind to members by ensuring their estate planning documents are ready for when their loved ones need them most. Benefits of the program include:

DOCUMENT PORTAL

Our secure online document portal provides you 24/7 access to all your estate planning documents. You will have peace of mind knowing that if you find yourself at the hospital unexpectedly, your documents can be accessed remotely by you or your agent.

ACCESS TO OUR TEAM

Our team will be available to answer your questions related to your foundational planning. If you have a question that falls outside of the foundational planning, we will try to connect you with a trusted partner or attorney to help.

ANNUAL REVIEW

Every year we will send you an overview of your estate plan and assets for your review. This provides an opportunity for you to examine your plan and confirm that it continues to serve you.

LEGAL AND TAX CHANGES

If your documents are impacted by changes in the law, we will update your existing estate plan to amend or adopt these changes.

SIMPLE UPDATES

Are you questioning the decision-making capabilities of a successor trustee you named? Or has a future decision maker moved out of the country, making their availability limited? Program members can make these updates to their estate planning documents and enjoy the benefit of not incurring additional legal fees

SUPPORT WITH ASSET TRANSFERS

If you acquire a new account or asset, our team will assist you in transferring that asset to your trust. Whether you open a bank account, a certificate of deposit matures, or you follow your financial advisor to a new firm, our assistance with these changes is included in the Program.

WORKSHOPS AND SPECIAL EVENTS

We host multiple workshops and events for our members. Topics may include "How to Write Your Healthcare Wishes," or "What Happens to My Estate After I Die?" We may even host a Happy Hour or Backyard BBQ to get to know you better. These events are designed to get to know you better while also inspiring you to live well and tackle that "Bucket List".

MEET WITH YOUR LOVED ONES

After your passing, we include a complimentary meeting for the person you have designated to oversee your affairs. In that meeting, we do a high-level review of the estate, outline the settlement process, and discuss how our team may be of assistance.