

THE LEGACY PROGRAM – EXHIBIT B
ASSET ALIGNMENT AND VERIFICATION AGREEMENT

Since we are helping transfer and align all of your assets to your revocable trust, you assume responsibility to help the Firm by fully disclosing to the Firm all of your assets. We can only share responsibility for the assets you tell us about and document for the Firm.

Asset Alignment: The Asset Alignment meeting for your estate plan can be expected to take place within two weeks of signing your estate planning documents. Asset Alignment and verification that all assets are aligned with your estate plan should be completed approximately four months thereafter.

Asset Alignment services to be provided to you by Kaiser Law Group (the Firm) will include the following:

1. Our team will prepare a spreadsheet identifying your assets as you have disclosed them to the Firm and illustrate recommended Asset Alignment;
2. Our team will help you re-title ownership into the name of your revocable trusts and/or designate beneficiaries as appropriate in accordance with your approval of same. Our team will prepare any and all signature-ready transfer documentation necessary for each asset identified on the SCHEDULE ATTACHED TO YOUR TRUST and provide instructions on their use or forward them directly to the appropriate institution for re-titling of the asset. For assets not listed on the SCHEDULE ATTACHED TO YOUR TRUST, our team will prepare any and all signature ready forms necessary to designate beneficiaries and provide instructions on their use or forward them directly to the appropriate institution for processing. Client will provide documentation for each asset showing current ownership, approximate value, contractual limitations (i.e. on retirement account custodial agreement or plan summary) and institution;
3. Telephone calls to financial advisors, CPAs, employment benefit personnel, life insurance agents, and other similar advisors to complete the initial Asset Alignment process;
4. Real estate located outside of California generally requires the assistance of an attorney licensed in that state to transfer the real estate into your trust. We charge for coordinating with out-of-state counsel *and* pass on the actual fees of the out-of-state attorney.
5. Timeshares are typically difficult to align with your estate plan. We often recommend the simplest plan of action with timeshares, but often the process is more involved. We generally charge for timeshares as if they are typical real estate properties, but timeshares requiring more work may be charged additional amounts.
6. **Client is obligated to disclose to the Firm all of the assets that Client owns. The Firm cannot transfer title to any asset not fully disclosed and cannot be held responsible for failing to transfer title of any such asset to your revocable trust.** *Assets which are not fully disclosed may be subject to probate at death, require payment of additional estate taxes, and may result in inadequate planning by counsel. Please be advised that the disclosure of additional assets after the initial design meeting may result in increased planning costs. The failure to fully disclose all assets is grounds for the Firm to terminate its engagement with Client and be relieved of any further obligation to Client.*

THE LEGACY PROGRAM – EXHIBIT C
ANNUAL LEGACY PROGRAM

Beginning Date: The **Annual Legacy Program** period begins 6 months after the date of this engagement.

Renewal: The **Annual Legacy Program** will be automatically renewed thereafter on an annual basis and the annual price shall be due and payable on your anniversary date, unless the Client notifies the Firm in writing that Client wishes to discontinue the Legacy Program plan. If Client decides to discontinue the Legacy Program plan after payment of the annual price, there will be no refund of the unused portion. The client can either choose to continue as a member through their renewal date and then their membership will be terminated, or they can choose to be removed at the time of notification. The annual price will automatically be adjusted by the increase or decrease in consumer price index (“CPI”) as calculated by the U.S. Bureau of Labor Statistics. This amount is also subject to adjustment by the Firm on an annual basis (subject to client agreement).

Annual Legacy Program Services: **Annual Legacy Program** services for your estate plan will include the following estate planning services:

1. Access to and assistance from our team to assist you in incorporating any new or changing assets so that they are properly funded into your estate plan. Primary residence at no charge. Non-primary residence property at half the cost for Legacy Program clients.
2. Later-acquired real estate in California will be charged at a discounted rate for Legacy Program clients; deeds related to entities are charged a higher rate. Real estate located outside of California generally requires the assistance of an attorney licensed in that state to transfer the real estate into your trust. We charge for coordinating with the out-of-state counsel *and* you will engage and pay the of the out-of-state attorney directly for the project.
3. At your request, we will review all of your assets to help ensure that your assets are properly aligned with your estate plan.
4. Access to our team to answer questions or concerns regarding your estate plan.
5. Additional copies of your documents provided upon request in PDF or in another digital format (e.g. on our client portal).
6. Family Meetings with your loved ones, trusted advisors, and helpers in order to review and discuss your estate plan while you are alive and well so that your wishes are known and understood.
7. Ability to update your estate plan whenever necessary to adjust for any changes in your life (see below for the specific Client-initiated changes included as a part of the Legacy Program).
8. Attorney-initiated update of your estate planning documents based on changes in the law in order to keep the integrity of your plan in place.
9. Educational workshops open to you, your family members, helpers and trusted advisors on various estate planning topics that may be relevant for you and your family.
10. Availability for counseling on legal matters involving your estate plan and advice on additional planning options as financial circumstances or laws change. At times, these changes may require additional planning outside of the scope of this agreement and may result in an additional legal charge. Note, no amounts will be charged other than those referred to in this agreement unless specifically agreed to by the Client.
11. Collaboration with your financial advisors, accountants and insurance professionals in order to properly integrate your estate plan with your life.

Amendments/Restatements to your Estate Planning Documents: We will provide you with *attorney-initiated* changes to your revocable trusts and ancillary documents, as we deem necessary or advisable to keep the trust agreements in compliance with estate planning law. We will also provide *client initiated*

"word processing" changes when requested by you or recommended by the firm. Examples of attorney-initiated and client-initiated amendments are as follows:

1. ***Attorney-Initiated Changes:*** We may from time to time recommend changes in your documents. Some of these changes might be designed to take advantage of minor changes in trust law; other changes will reflect ideas we learn from experience as trust administration and estate planning attorneys. Both of these kinds of changes are made at no charge and are initiated by us rather than the Client.
2. ***Client-Initiated Changes:***

Reasonable discussions to talk through potential changes to you plan is certainly a core part of the Legacy Program. After talking through your questions/considerations, we may together decide to make changes to your estate plan as set forth below.

a. Word Processing Changes – part of the Legacy Program (no additional cost)

We will provide reasonable word-processing type amendments to your plan (in addition to updating your estate plan summary) at your request without charge. For example: (1) changing the name of a beneficiary (e.g. a daughter because she married and changed her last name) ; changing the dollar amount you want to leave to your favorite charity or changing the percentage of your estate you are leaving to each child; or (3) switching the order of your designated health care agents or trustees. As a litmus test, if you can easily tell a secretary exactly what you want to change, and it would not be necessary for an attorney to interpret and draft the terms of the amendment, you can generally assume that would be what we consider "word processing."

b. Substantive Changes – discounted flat fee of \$1,900 (typically \$5,000+ for clients not on the Legacy Program)

Substantive changes to a plan (and to your estate plan summary) would be those beyond the "word processing" changes outlined above or those that might require a meeting with an attorney. Examples would be: (1) changing the structure of a trust; (2) creating specific gifts for beneficiaries with custom, specific terms and contingencies; (3) adding in a professional or corporate trustee and providing guidance to that trustee:

If you require services not included in the Legacy Program (e.g., estate tax planning, trust administration including changes of current trustee(s), restructure of estate plan due to major change in law or in desired results, expected inheritance coordination and review), we will provide a 10% discount to Legacy Program clients.

Our annual legacy program is a flat fee that is intended to cover the scope of services outlined above. If a project extends beyond the program as outlined, we may request additional funds to cover the extra scope of the project, upon your approval.

Termination: *Client may at any time terminate the Annual Legacy Program services by notifying attorney and/or failing to pay the annual Legacy Program amount. We (the Firm) may terminate the Annual Legacy Program services and agreement for any of the following reasons:*

1. If Client fails or refuses to make changes to the estate planning documents that are recommended by attorney or refuses to follow attorney advice regarding alignment of assets;
2. If Client insists upon attorney taking a course of action that is contrary to law or ethics; and

3. If Client moves their residence to a state where attorney is not licensed to practice, and attorney is unable to reasonably assure that Client's ongoing Legacy Program and administration needs will be met. In this last instance, we will attempt to help you locate an attorney in that state who can provide you with continuing services similar to those services that you have been receiving from the Firm.

The Firm, or successor counsel, must give reasonable written notice to Client prior to having Client terminated from the annual Legacy Program for failure to pay the Legacy Program amount.

Initial(s)