2018 Trust Update Program
Client Participation
Terms and Conditions

1. **Annual Program Term:** January 1, 2018 through December 31, 2018**.**
2. **Annual Fees:** An Annual Program fee must be paid to participate. The fee for 2018 is $49. Program fees may be adjusted annually.
3. **Special Option for 2018:** Due to significant client concern and potential changes to tax and personal protection laws, fees are waived for participants who attend one of the two 360° Risk Assessment Seminars offered this year (February 7, 2018 or May 31, 2018).

3\. **Client Status:** Client's participation in the Trust Update Program obligates Rock W. Allen of Sage Law Partners to take reasonable steps to update client regarding pertinent law changes. Clients are encouraged to update us about any changes in their families, whether people or property related.

4. **Event dates, times and locations subject to change:** We make every effort not to cancel or reschedule group events. However, unavoidable circumstances such as illness, extreme weather conditions or venue conflicts occasionally arise. Watch for confirmation emails as the date for an event approaches. If you do not receive a confirmation email during the week before an event, we strongly encourage you to contact us to confirm its date, time and location.
5. **Trust Paper Restatement (TPAP) Cost:** The cost for an active client participant to update their trust documents in a group at the Trust Paper Restatement (TPAP) is $275/single and $375/couple. The cost to update trusts privately is $600/single and $750/couple. All Trustors and Trustees must be present to sign documents. Additional charges may be assessed to accommodate signing separately.
6. **No Guaranty:** Results vary depending on your level of active participation in the program. Just signing up for the program does not guaranty that your trust will work as intended. Active participation should increase the likelihood that it will work as client and attorney partner together to accomplish your estate planning goals.
7. **Confidentiality:** Our clients' identity, legal matters and personal affairs are confidential. Privileged information disclosed by client to attorney in private meetings is confidential. By attending a group client meeting, client agrees to waive attorney client privilege only concerning their identity as our client. Communicating private matters in a group setting is discouraged. The right to attend group client meetings may be revoked if any attempt is made to pry into the private affairs of another client. We have ways to facilitate private communication necessary to support client group curriculum. If you are in any way uncomfortable meeting with your attorney in a group setting, take advantage of the program on an individual rather than a group basis, additional fees may apply.
8. **Settlement on Disability or Death:** Attorney assistance on impending or existing disability or death is critical to the success of the trust. It is recommended that clients contact Sage as soon as practicable in these circumstances. Early contact gives the best chance that the settlement will be as effective and inexpensive as possible. Late contact often results in additional attorney fees to correct settlement mistakes, if indeed those mistakes can be corrected.