

The Family Legacy Maintenance Program™ (the “Program”) is exclusively for existing clients of Sheppard, Brett, Stewart, Hersch, Kinsey & Hill, P.A. (the “Firm”). As a precondition to enrollment, Client(s) must have Foundational Documents executed. For these purposes, “Foundational Documents” are estate planning and/or wealth preservation planning documents created or restated on or after January 1, 2006 under the Firm’s proprietary Family Legacy Solution™ or Global Privacy Solution™ systems. If you have a question as to whether your documents meet these criteria, please ask and we will advise. By signing below, Client(s) agree to the following:

1. The annual fee for a married couple is Three Hundred Ninety Five Dollars (\$395.00).
2. The annual fee for a single person is Two Hundred Ninety Five Dollars (\$295.00).
3. Clients are entitled to one (1) year free maintenance in the Program. The annual fee will be automatically charged to Clients’ Visa or MasterCard on or about the first business day in January following enrollment. The first charge will be prorated based upon the number of free days remaining in Clients’ Year 1 of the Program.
4. Charges to Client’s credit card will occur each subsequent year on the first day of business in January unless Clients notify the Firm in writing of withdrawal from the Program. Clients may cancel their enrollment at any time. Such notice must be delivered via US Postal Service or by overnight delivery service to the Firm’s address: **SHEPPARD LAW FIRM, 9100 COLLEGE POINTE COURT, FORT MYERS, FL 33919 ATTENTION: FAMILY LEGACY MAINTENANCE PROGRAM.** Clients will lose all privileges of the Program immediately upon the Firm’s receipt of Clients’ notice of withdrawal or cancellation.
5. As a condition to enrollment in the Program, Clients acknowledge that any waiver of conflict of interest necessary for the Firm to represent a married couple continues to apply, as does any other waiver of confidentiality that Client may have executed as a part of Clients’ estate and/or wealth preservation plan. (For example, the waiver Client may have signed allowing the Firm to discuss Client’s planning with Client’s CPA or financial advisor so that Client’s advisors are coordinated within Client’s plan)
6. Clients have an ongoing obligation to inform the Firm of any material change in his or her health, financial condition, marital status or family situation, as these are factors in every estate plan that must be considered when recommending modifications, changes or updates.

The Firm retains a continuing right to modify the Program’s (i) fee schedule; (ii) benefits and/or (iii) enrollment requirements. Any Program modifications will be forwarded in writing to Clients’ last known mailing address at least thirty (30) days before any modifications to the Program are enacted. For purposes of these Terms of Enrollment, when referring to Client or Clients, the plural shall be read as singular and vice versa as may apply to the undersigned.

I (we) \_\_\_\_\_ hereby enroll in The Family Legacy Maintenance Solution

Print Name(s)

in accordance with the above dated this \_\_\_\_ day of \_\_\_\_\_, 20\_\_.

We authorize the Firm to charge our Visa/Mastercard Card # \_\_\_\_\_

expiration date \_\_\_\_\_ in the name of \_\_\_\_\_ at the following Billing Address:

Street Address	City	State	Zip
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as per the above terms of enrollment.

\_\_\_\_\_  
 Client

\_\_\_\_\_  
 Client



SHEPPARD, BRETT, STEWART,  
 HERSCH, KINSEY & HILL P.A.  
 Attorneys at Law