

# PEACE *of* MIND

## Program

We know there are times when you have a question regarding your estate planning and want to call without worrying about extra fees. We believe our Peace of Mind Maintenance Program removes this concern, while ensuring your estate plan is well maintained. We offer the following services for a one year period for a fixed fee:

### **Complimentary Services**

- An annual review of your planning documents with your attorney.
  - If you prefer, we can invite your accountant, insurance broker or any other financial advisor to join us for this review.
  - If you cannot fit a review into your schedule you are encouraged to send other family members or close friends who might benefit from a planning meeting.
- Complimentary updates when you need to change your Advance Directives agents.
- Unlimited complimentary telephone calls to answer any questions whether it be about a potential litigation, a real estate question, insurance coverage issues or tax savings.

### **Complimentary Access to Documents**

- 24/7 access to your documents. We will upload your planning documents to a secured site which you can access online whenever you want to review them.

### **Special Information on Timely Issues**

- Information alerts tailored to the interests of POM clients.
- A hard copy of our Planning for Today's Concerns newsletters.
- An annual luncheon just for POM members with interesting speakers and round-table discussions on timely topics.

### **Financial Savings**

- A fifteen percent [15%] discount on all regular fees for creating new documents or making document revisions.

\* Please note that these benefits can only be realized with your active participation. We look forward to helping you fulfill the value of this program, please contact us at 516-683-1717 with any questions or concerns.

1600 Stewart Avenue | Suite 300 | Westbury, NY 11590 | phone 516-683-1717 | fax 516-683-9393

Westbury | Islandia | Lido Beach | Manhattan

By Appointment Only:

Forest Hills | Patchogue | Southold

[www.vjrussolaw.com](http://www.vjrussolaw.com)