

# Introducing the Mathews Law Client Care Program

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Supporting Your Plan.  
Protecting Your Loved  
Ones. Preserving Your  
Legacy.



# Why Did We Create A Client Care Plan?

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Life changes — your plan should too.

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New assets, accounts, or family members can make your plan outdated.

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Without updates, your plan may not work as intended when it matters most.

# Ongoing Support Made Simple

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We built this program because meeting with your estate planning attorney shouldn't be a one-time event – it's a lifelong relationship. Our goal is to make sure your plan always reflects your life and values.

The Client Care Plan is intended to benefit you for years to come:

- **Stay Current:** Regular Check-ins from us to see if anything has changed.
- **Stay Informed:** Quarterly webinars with our Attorney on a variety of topics.
- **Stay Connected:** Document updates, discounts, and other services available to you throughout the year.

**The Client Care Plan has three levels – choose the one that works best for you and your loved ones.**

# Level 1: Cornerstone Plan

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The Cornerstone Care Plan provides the **foundational support** you need to keep your estate plan current as your life evolves. It ensures that your documents, assets, and decision-makers remain aligned with your goals.

## Your Membership Includes:

- **Twice-yearly check-ins** with our Client Service Coordinator to review any life, planning, or asset changes that may affect your plan.
- **Quarterly, members-only webinars** with Attorney Lisa Mathews on estate planning topics and practical updates.
- **Special member pricing:** 10% discount on additional services (up to \$500 per year).
- **Access to our notary** (up to three times per year, Vienna office only).
- **Secure 24/7 access to your client portal** — easily update your asset list and download your executed estate planning documents anytime.
- **Your choice of one annually:**
  - Updated Advance Medical Directive(s) and Emergency Card(s) for you; or
  - Updated Power of Attorney for you; or
  - Complimentary Advance Medical Directive and Emergency Card or Power of Attorney for one immediate family member (VA or MD residents only); or
  - \$250 gift certificate to be applied toward a family member's estate plan (VA or MD residents only).



**Membership Investment:**  
\$55 per month — or \$600  
per year when paid in full.

# Level 2: Peace of Mind Plan

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The Peace of Mind Plan offers **enhanced support and proactive planning** to keep your estate plan aligned with life's changes and evolving needs. It's designed for clients who want ongoing updates, added flexibility, and continued connection with our team.

## Your Membership Includes:

- **Twice-yearly check-ins** with our Client Service Coordinator to review life, planning, or asset changes.
- **Quarterly members-only webinars** with Attorney Lisa Mathews on timely estate planning and family wealth topics.
- **VIP member pricing:** 20% discount on all services (up to \$750 per year).
- **One simple update to your estate plan annually** — for changes such as updated names, percentages, or contact details (additional changes billed hourly).
- **Access to Generational Story** to preserve your stories, values, and wisdom for the next generation.
- **Access to our notary** (up to three times per year, Vienna office only).
- **Secure 24/7 access to your client portal** — easily update your asset list and download your executed documents anytime.
- **Your choice of one annually:**
  - Emergency Essentials Plan for a family member (VA or MD residents only); or
  - Kid's Protection Plan for you or a family member (VA or MD residents only); or
  - \$500 gift certificate to be applied toward a family member's estate plan (VA or MD residents only).



**Membership Investment:**  
\$89 per month — or \$995  
per year when paid in full.

# Level 3: Legacy Plan

The Legacy Plan provides an **ongoing relationship with your estate planning team**, ensuring your plan, assets, and loved ones are supported across generations. It's our most comprehensive level of care.

## Your Membership Includes:

- **Quarterly check-ins** with our Client Service Coordinator to review changes in your life, assets, or family.
- **Quarterly members-only webinars** with Attorney Lisa Mathews for timely updates and advanced planning topics.
- **VIP member pricing:** 20% discount on all services (up to \$1,500 per year).
- **Access to our notary** (up to five times per year, Vienna office only).
- **Up to two simple estate plan updates per year** — for name changes, percentage adjustments, or other straightforward revisions.
- **Direct attorney access** with your choice of any two:
  - Annual family or beneficiary meeting
  - Annual guidance meeting with decision-makers
  - Annual comprehensive estate review
- **Access to Generational Story** to preserve your stories, values, and wisdom for the next generation.
- **Secure 24/7 access to your client portal** — easily update your asset list and download your executed documents anytime.
- **Your choice of one annually:**
  - Emergency Essentials Plan for a family member (VA or MD residents only); or
  - Kid's Protection Plan for you or a family member (VA or MD residents only); or
  - \$500 gift certificate toward any family member's estate plan (VA or MD residents only).
- **Concierge assistance with funding assets** into your trust and updating beneficiary designations.



**Membership Investment:**  
\$170 per month — or  
\$1,950 per year when paid  
in full.

# What You Gain With Membership



✓ Confidence that your plan works



✓ Ongoing access to your legal team



✓ Peace of mind that your loved ones are prepared



✓ Savings on updates and additional services



# Did Mathews Law Already Create Your Estate Plan?

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- We have made a lot of changes recently. If you worked with us in the past and did not receive an emergency card with your Advance Medical Directive, we'll make sure you get one when you sign up for the program at no extra cost.
- The Emergency Card stays in your wallet and ensures that emergency medical personnel know who your emergency contacts are.



## Emergency Information Card

**Client Name: Jane Doe**

**Date of Birth: 1/2/1960**

**Primary Emergency Contact/Health Care Agent:**

Mary Doe

888-8888

**Alternate Emergency Contact/Health Care Agent:**

Sam Doe

777-7777





# Ready to Stay Protected?

Choose your plan today. Please call or email our Client Service Coordinator to sign up or ask any additional questions:

Rohey Sanyang

[clientservice@mathewslawpllc.com](mailto:clientservice@mathewslawpllc.com)

703-991-0323