

VIP Client Care Program Agreement

THIS AGREEMENT is made between the undersigned client and Alex Kincaid Law Office, hereinafter referred to as “the Firm.”

Client hereby retains and employs the Firm to maintain our estate plan as outlined in this Agreement, for the applicable fee.

Term: The Annual Client Care period shall be one year from the date of enrollment (The date your payment is processed)

VIP Client Care Description

Our VIP Client Care Program is an on-going service designed to maintain a comprehensive and effective estate or business plan for each of our clients. Membership in our Estate, Business, Firearms, or Elite VIP Program includes the benefits described on our current VIP Client Care Program “Membership Benefits” Sheet.

Fees and Billing

Client(s) Understands:

- Annual Fee:** Client understands that the annual fee and/or services to be provided under this maintenance agreement are subject to change, but client will be notified in writing of any such change prior to renewal.
- Renewal:** Enrollment in the plan will automatically renew on an annual basis unless canceled by client. Client may cancel an upcoming annual enrollment by sending written notice (paper or electronic) to Alex Kincaid Law. Should client decide to discontinue the membership after payment of the annual fee, client understands that services will continue to be provided until the expiration of the annual membership period, and that client will not be reimbursed for any unused portion of the fees. The Firm may discontinue our representation under this Agreement should client fail to meet client's commitment.
- Advances:** Client agree to pay all of the Firm's out of pocket costs, such as: recording fees and filing fees incurred in maintaining our plan.

Client understands that the VIP Program phase of a plan is a disciplined process and requires client's attention and commitment. Client understands that the Firm has custom designed the plan in order to reach client's specific objectives. In order to maintain client's plan so that it accomplishes client's goals, client agrees to keep the Firm advised of changes in client's family or financial situation or in client's estate or business planning objectives, and to hold the Firm harmless should client fail to do so. Client agrees to provide the Firm copies of all documentation required for maintaining client's plan.

Client also understands that the Firm believes it is imperative that client attend a personal annual review and to continue to properly title all the assets client acquires in the name of client's trust or business entity. This is key to the VIP Program working effectively for client to maintain the plan. Client agrees to meet with the Firm to obtain the appropriate amendments. Although the Firm will provide reminders of the meetings and other benefits available to client through the VIP Program, client VIP Client Care Program Agreement understands that the Firm is not responsible for otherwise ensuring that client take advantage of the benefits of the program membership.

This agreement represents the complete agreement and supersedes any prior understanding or agreements, written or oral in regards to this membership program. This agreement may be amended only by a written document signed by all of the parties. Any party, without express written consent of the other parties, may not assign this agreement.

I have read this Agreement, and I understand and accept its terms.