

Estate Planning

2 Hours of Estate Attorney Consultation Per Year for You or Any New Referral	✓	✓	✓
Estate Planning Questions by Phone - No Charge	✓	✓	✓
24-Hour Online Access to Healthcare Power of Attorney	✓	✓	✓
Annual Plan Review Checklist	✓	✓	✓
Asset Inventory Toolkit	✓	✓	
Free Deed Transfer for Refinance (Primary Home Only)	✓	✓	
Free Advance Healthcare Directives for Children and Grandchildren at 18 (\$400 Value)	✓	✓	
Plan Amendments Discount	15%	10%	
"My Legacy" Letter	Full Assistance	Template Only	
Annual Estate Planning Credit (Non-Compounding, Per Anniversary Year)	\$400/Year	\$400/Year	\$400/Year

Estate Administration

1 Hour of Estate Administration Initial Consultation per Year	✓	✓	✓
Successor Trustee Handbook	✓		
Estate Administration Discount for Family	15%	10%	
Family Constitution	Full Assistance	Template Only	

Business & Tax Benefits

1 Hour of Business and Tax Attorney Time per Year	✓	✓	
Business & Tax Discount - Maintenance	10%		
Business and Tax Discount - Initial	15%	10%	

Litigation Benefits

1 Hour of Litigation Attorney Consultation per Year	✓	✓	
Litigation Discount	10% Discount		

Firm Benefits

Free House or Hospital Calls (California only * when medically necessary)	✓	✓	✓
Free Parking at Offices & Seminars	✓	✓	✓
Access Card with Member Information	✓	✓	✓
Unlimited New Referrals can use Attorney Consultation Benefits and Annual Credit Benefits without affecting member's benefits	✓	✓	✓
Event Recordings & Livestreams	✓	✓	✓
Add Children/Grandchildren to Membership During Lifetime @ discounted rate - 50% of Base Cost Plus Monthly	✓	✓	✓
Complimentary Financial Planning Review Annually	✓	✓	✓
Copenbarger Merchandise & Gifts	✓	✓	
Transferable on Death to Non-Member Children at \$4,000/Initiation + Monthly Cost, per Child	✓		

Access Membership Investment

Membership Initiation Fee - One Time	\$8,800	\$6,800	\$4,800
Member Services Rate - Monthly	\$50/Month	\$30/Month	\$20/Month
Up to 12 month Payment Plan for Membership Fee	✓	✓	✓