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# LAW OFFICES OF BERGE & BERGE LLP

TRUST AND ESTATE PLANNING SPECIALISTS

(408) 985-9918

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## LifePlan™ Trust Maintenance Program Enrollment Agreement

NAME: \_\_\_\_\_ PHONE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

\_\_\_\_ YES! I/we would like to enjoy the many benefits of the LifePlan™ Trust Maintenance Program for the low annual fee of \$350 (single) or \$425 (married)

\_\_\_\_ YES! I/we would like to enjoy the many benefits of the LifePlan™ Trust Maintenance Program for two years at an even better fee of just \$645 (single) or \$775 (married)

\_\_\_\_ NO. I/we do not want to enroll in the LifePlan™ Trust Maintenance Program at this time. I/we understand that the firm will continue to represent me/us as specific legal needs arise in my/our life and that those services will be billed at the hourly rate (currently \$450/hour).

### Please Select One Form of Payment:

\_\_\_\_ My/our check for \$\_\_\_\_\_ is enclosed. Please make check payable to "Berge & Berge LLP."

\_\_\_\_ Charge \$\_\_\_\_\_ to my credit card as follows:

Credit Card:  VISA  MasterCard  Discover

Card Number: \_\_\_\_\_ Exp Date: \_\_\_\_\_ Billing Zip Code: \_\_\_\_\_

3-Digit Security Code: \_\_\_\_\_ (found on the back of your card)

Name on Card: \_\_\_\_\_ Signature: \_\_\_\_\_

The *Additional Terms and Conditions* on the attached pages are an integral part of our Agreement and are hereby incorporated into our Agreement by this reference. Please read and consider them carefully before you sign your acceptance below.

Client Acceptance:

Date: \_\_\_\_\_ By: \_\_\_\_\_

Date: \_\_\_\_\_ By: \_\_\_\_\_