



UPDATE  
EXPRESS  
PROGRAM™

## Member Agreement

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The Undersigned Client \_\_\_\_\_ is a current client of Ilene L. McCauley of Goldinov & McCauley, PLC. The Client wishes to join the EP UPDATE EXPRESS PROGRAM™ to update the Client's estate planning documents on an on-going basis.

Upon receipt of the annual fee, Goldinov & McCauley, PLC, by Ilene L. McCauley, will Restate the following documents (the "Documents"):

|          |                                    |
|----------|------------------------------------|
| \$ _____ | Revocable Living Trust             |
| \$ _____ | Last Will                          |
| \$ _____ | General Durable Power of Attorney  |
| \$ _____ | Living Will                        |
| \$ _____ | Health Care Power of Attorney      |
| \$ _____ | Mental Health Power of Attorney    |
| \$ _____ | Elder Certificate (if appropriate) |
| \$ _____ | HIPAA Authorization                |
| \$ _____ | DocuBank Enrollment Form           |

The Restatement will include administrative changes that are required due to updates in the current law, as well as those changes specifically outlined in the EP UPDATE EXPRESS PROGRAM™ — CONFIDENTIAL DATA FORM.

Client will not meet with Ilene L. McCauley. Client will fill out the EP UPDATE EXPRESS PROGRAM™ — CONFIDENTIAL DATA FORM ("Form") as clearly as possible. Client will return the form to Ilene L. McCauley's office. A meeting will be set up so that the Client will meet with a member of Ilene L. McCauley's staff to review the Form. After the first meeting, an additional meeting will be set up with a member of Ilene L. McCauley's staff to review and sign the documents. The meetings will be at mutually convenient times, at the office of Ilene L. McCauley. In the event Client needs to meet with Ilene L. McCauley, or requires design changes or any other legal services other than is outlined above, client will be billed at our current hourly rate for attorney time. However, the current hourly rate for attorney time will be:

|          |  |
|----------|--|
| \$ _____ | Reduced by the amount of the Annual Fee, and |
| \$ _____ | Reduced by 10% of the entire fee.            |

Client acknowledges that a full review of the documents may be required every five (5) years. In the event that Client is married (or has a significant other), both Clients will sign this Agreement and two (2) Member fees will be due and payable. This Agreement is automatically renewable unless terminated in writing by Client or Goldinov & McCauley, PLC.

Dated \_\_\_\_\_

\_\_\_\_\_  
Client

\_\_\_\_\_  
Client



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## 2009 Annual Fee

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The 2009 Annual Fee is \$ \_\_\_\_\_ per client. The fee is due and payable on or before January 15, 2009.

In the event the annual fee is paid before December 15, 2008, the amount of the fee is \$ \_\_\_\_\_ per client.

Dated \_\_\_\_\_

\_\_\_\_\_  
Client

\_\_\_\_\_  
Client

ILENE L. MCCAULEY



GOLDINOV &  
MCCAULEY, PLC

Attorneys and Counselors at Law  
*Estate, Business and Tax Planning*

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