



Tab 1

Lifetime Support Solution™

1. Evans Support Team at Benson & Case, LLP
2. Helper Hints™
3. Annual LifeSpan Family Reunion™
4. Client Update Program™
5. Update Teleconference Instructions
6. LifeSpan Amendment Process™
7. Lifespan Funding Process™
8. Bill & Mary Sample Asset Review Report™
9. Estate Planning Review Worksheet

Contact Info



CUSTOMER SERVICE - OR - DIRECT

*Calls are answered 8:30am to 5:00 pm
Monday - Friday*

Phone: 303-757-8300
Toll Free: 1-800-254-1490
Fax: 303-753-0444

James Evans - Attorney
303-757-8300
James@bensontcase.com

Anne Farrer- LifeSpan Paralegal
303-757-8300 ext 108
Anne@bensontcase.com



EMAIL: Lifespan@bensontcase.com

**Kris Fabricius – Probate
Paralegal**
303-757-8300 ext 102
Kris@bensontcase.com



WEBSITE: www.bensontcase.com

Dennis W. Newman- Paralegal
303-757-8300 ext 119
[Dennis @ bensontcase.com](mailto:Dennis@bensontcase.com)

HELPER HINTS™

- I. Empower the Trustmaker's Legacy**
 - a. Discuss**
 - b. Decide**

- II. Attend LifeSpan Learning Solution™ Programs**
 - a. Support Trustmaker as needed**
 - b. Personal attendance**
 - c. Website access and/or “attendance”**

- III. Support Red Check Review System™**
 - a. Asset Review Report™**
 - b. Red Check System Review™**

- IV. Know “911” Emergency Steps (after Disability or Death Occurs)**
 - a. Get your Helper's HandBook™ (Blue Book)**
 - b. Call Law Office**
 - c. Get Red Book**
 - d. Support the Process**

**ANNUAL LifeSpan
FAMILY REUNION™**

- **We All Have the Same Last Name (Living Trust)**
- **Everyone's Expected, the More Generations the Better**
- **Family, Close Friends and Advisors Are Welcome**
- **Not Everyone Comes!**
 - **If you don't come, you don't know what's going on**
 - **Hurts the relationship**
 - **Everybody talks about you!**
- **If you do come, you don't expect to work.**
- **You do expect great conversation.**
 - **What have you been up to?**
 - **What are your plans?**
- **You leave feeling reconnected.**
 - **To the people**
 - **To yourself**
 - **To what's really important to you!**

Law Firm "Reunion"

- **Firm Update**
- **Fee Announcement**
- **Legal Update**
- **Education Program Unveiled**
 - **Family Attendance Encouraged**
 - **Advisors Welcome**
 - **No Document "Work" Expected**

**LIFESPAN
CLIENT UPDATE PROGRAM™**

- **CLIENT Update Program (Not just documents)**
 - **STOP, LOOK, LISTEN!!**

- **You Continue to Teach Us the Family.**
 - **Relationships**
 - **Goals/Values**
 - **Finances**

- **We Continue to Teach You the Law.**
 - **Legislation**
 - **Regulations**
 - **Court Decisions**

- **Working Meeting (Maintenance)**
 - **Funding**
 - **Document Update**
 - **“Amnesty” Day or Night**

- **Education**
 - **Review of “Stories”**
 - **Continuation of Reunion Topics**

- **TO DO List Assignments**
 - **For You**
 - **For the Law Firm**

RESULT:

**Plan Maintained, All are Updated, Wisdom Continuously Developed
and Added To Planning**

Update Teleconferences



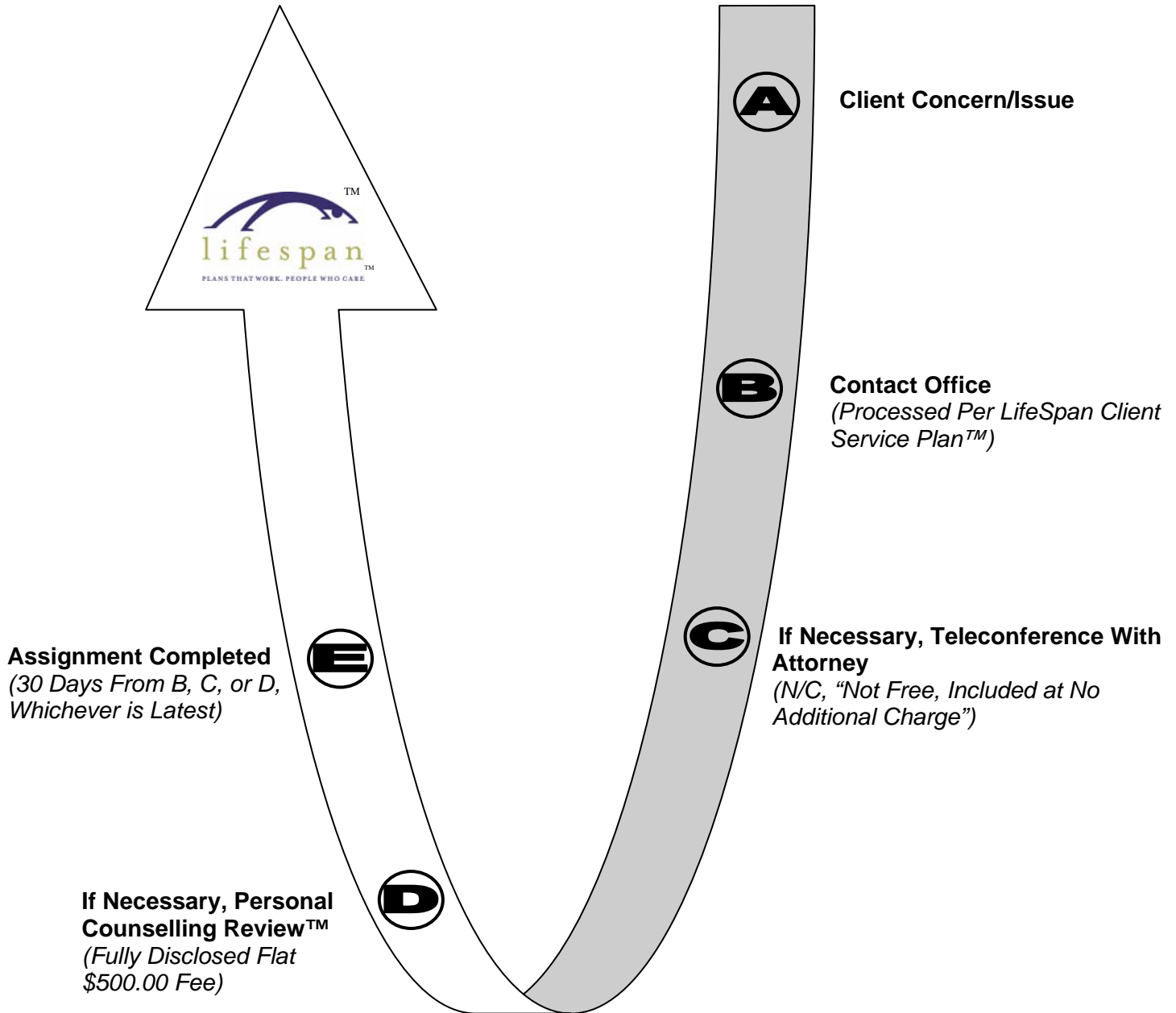
Stay Connected by Joining in on a Teleconference Call!

Update teleconferences are held from time to time. Please follow the instructions below to join in on the call:

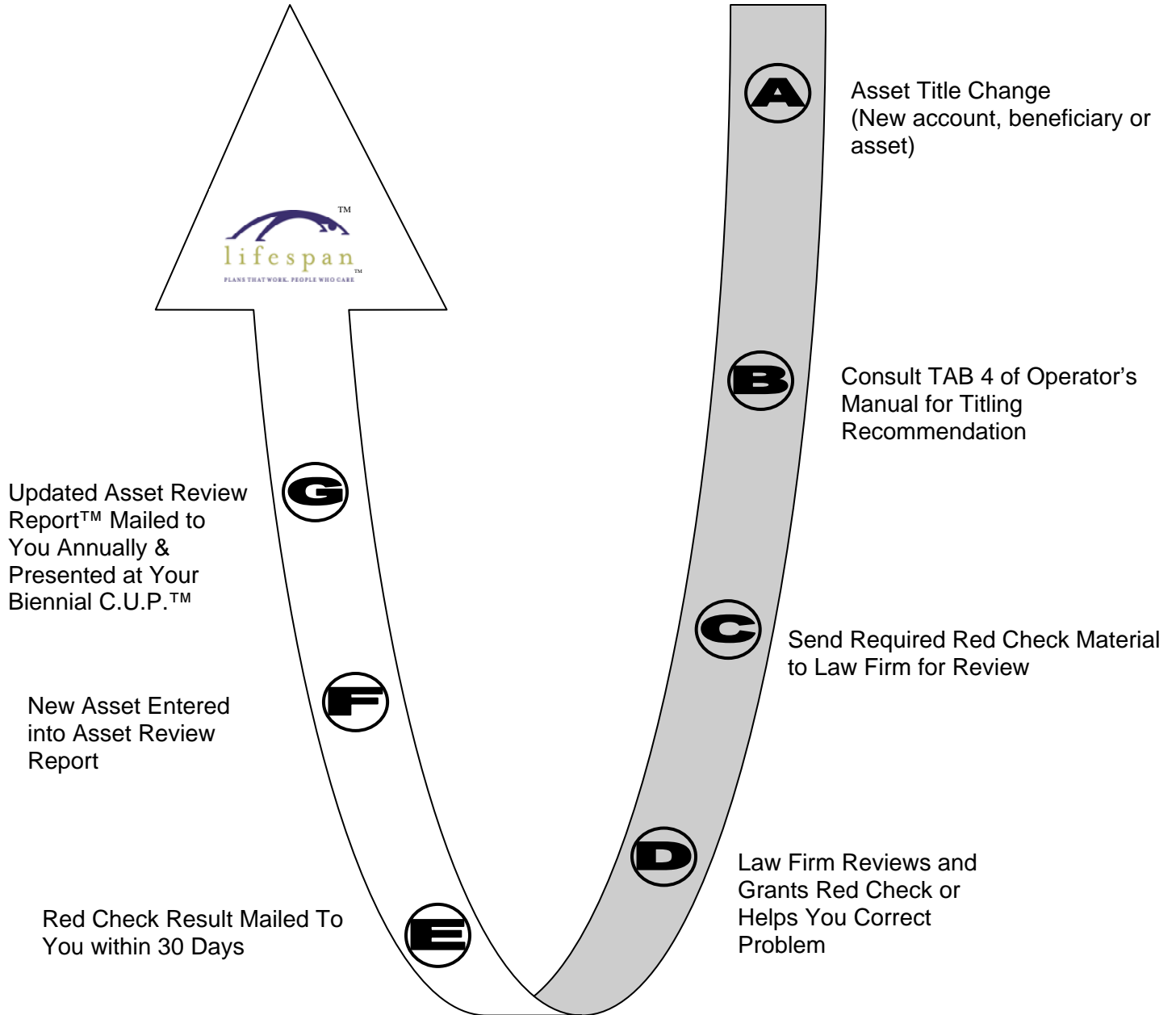
- ◆ Dial the Teleconference Call-In Number:
(218) 339-2500
- ◆ When the call is answered, dial the Participant Access Code
789021
- ◆ Complete your entry of the Participant Access Code by dialing the
“Pound” sign, which appears as follows:
#

There will be no operator, so simply announce yourself upon your arrival. You will be welcomed into the call and the attorney will moderate the teleconference

LifeSpan Amendment Process™



Funding Review Process™





Asset Review Report

**William H. Sample
and
Mary L. Sample**

Prepared by:

Benson & Case, LLP

December 31, 2009



Asset Review Report as of December 31, 2009
for
William Sample and Mary Sample

Cash Accounts

Company	Type	Original Account #	New Account #	Original Owner	New Owner	Previous Value	New Value
✓ US Bank	Checking	1 036 7044 2401	N/A	William	William's RLT	\$878	
✓ 1st Bank South Jeffco	Money Market	720-401-7366	N/A	JT - William and Mary	William's RLT	\$4,368	
✓ DPS Credit Union (Westerra)	Regular Shares	Member # 92130-S1	N/A	Mary	Mary's RLT	\$1,460	
✓ DPS Credit Union (Westerra)	Regular Shares	Member # 92130-S1.1	N/A	Mary	Mary's RLT	\$3,408	
Total Cash:						\$10,114	

Investment Accounts

Company	Type	Original Account #	New Account #	Original Owner	New Owner	Previous Value	New Value
✓ Vanguard	Vanguard Prime Money Market Fund	0030- 09878428679	N/A	Mary	Mary's RLT	\$3,247	
Total Investments:						\$3,247	

FUNDING REPORT

December 31, 2009

✓ = Verified

✍ = Need written verification

✘ = Do Not Fund/ Not Fundable/ Other

**Asset Review Report as of December 31, 2009
for
William Sample and Mary Sample**

Stocks

Company	Original Certificate #(s)	Original Account #(s)	Original Owner	New Owner	No. of Shares	Previous Value	New Value
	New Certificate #(s)	New Account #(s)					
✓ ConAgra Foods, Inc.	S 144581 (200 Shares)	3110040572 (393.066 DRIP)	William	William's RL	593.066	\$14,264	
	N/A	N/A					
Total Stocks:						\$14,264	

Bonds

Company	Description	Original Owner	New Owner	Previous Value	New Value
✓ I	Treasury	Mary	Mary's RLT	\$300	
Total Bonds:				\$300	

Personal Effects

Type	Description	Original Owner	New Owner	Previous Value	New Value
✓ Household Goods	Personal Property	William	William's RLT	\$5,000	
✓ Household Goods	Personal Property	Mary	Mary's RLT	\$5,000	
✓ Household Goods	Fine Art	Mary	Mary's RLT	\$20,000	
✓ Motor Vehicle	2004 Chevy Avalanch VIN # 1GCHK23024T136408	William	William's RLT	\$10,000	
✓ Motor Vehicle	1996 Dodge Pickup VIN# 1B7KF26CXTS128922	Mary	Mary's RLT	\$5,000	
Total Personal Effects:				\$45,000	

December 31, 2009

✓ = Verified

✍ = Need written verification

✘ = Do Not Fund/ Not Fundable/ Other

Asset Review Report as of December 31, 2009
for
William Sample and Mary Sample

Retirement Plans

Company	Type	Account #	Owner	Primary Beneficiary	Contingent Beneficiary	Previous Value	New Value
✓ AIM Investment Services, Inc.	403(b) (Denver Public Schools)	Plan ID 902358000	Mary	Mary's RLT	William	\$17,664	
✓ Pacific Life Insurance Company	IRA- Annuity	VR04038946	William	William's RLT	Mary	\$76,191	
Total Retirement Plans:						\$93,855	

Insurance Policies

Company	Type	Policy #	Original Owner	New Owner	Primary Beneficiary	Contingent Beneficiary	Previous Value	New Value
		Insured						
✓ Western Reserve Life Assurance Company	Universal	01-A0342588 William	William	William's RLT	William's RLT	Mary	Death Benefit: \$237,000 Surrender Value: \$117,721	
✓ Met Life/ Denver Public Schools	Group Life	93958 Mary	Mary	N/A	Mary's RLT	William	Death Benefit: \$8,750 Face Amount: \$8,750 Surrender Value: \$0	
Total Insurance:							\$245,750	

December 31, 2009

✓ = Verified

✍ = Need written verification

✘ = Do Not Fund/ Not Fundable/ Other

Asset Review Report as of December 31, 2009
for
William Sample and Mary Sample

Pension Plans

Company	Plan ID#	Owner	Primary Beneficiary	Contingent Beneficiary	Previous Value	New Value
✓ Denver Public Schools	XXX-XX-XXXX	William	William	Mary's RLT	\$119,649	
Total Pensions:					\$119,649	

Annuities

Company	Type	Account #	Owner	Primary Beneficiary	Contingent Beneficiary	Previous Value	New Value
✓ Allianz Life Insurance Company of North America	Single	70248372	Mary	William	Mary's RLT	\$11,303	
Total Annuities:						\$11,303	

Monies Owed to Client(s)

Name of Debtor	Date Due	Owed To	Assigned To	Previous Value	New Value
✓ John H. Sample		William	William's RLT	\$1,500	
Total Monies Owed to Client(s)				\$1,500	

Funding Report

December 31, 2009

✓ = Verified

✍ = Need written verification

✘ = Do Not Fund/ Not Fundable/ Other

**Asset Review Report as of December 31, 2009
for
William Sample and Mary Sample**

Real Property

Address	Original Owner	New Owner	Original Basis	Current Value	Mortgage Amount	Equity
✓ Residence 123 Any Street Aurora, CO 80012	JT - William and Mary	William's RLT and Mary's RLT as T/C	\$59,000	\$150,000	\$0	\$150,000
New Value:						
Total Real Property:					\$150,000	

Total

Total Assets:	\$694,982
----------------------	------------------

Funding Report

December 31, 2009

✓ = Verified

✍ = Need written verification

✘ = Do Not Fund/ Not Fundable/ Other

**Asset Review Report as of December 31, 2009
for
William Sample and Mary Sample**

New Assets

Company	Type	Account #	Owner	Value

Funding Report

December 31, 2009

✓ = Verified

✍ = Need written verification

✘ = Do Not Fund/ Not Fundable/ Other

**Asset Review Report as of December 31, 2009
for
William Sample and Mary Sample**

Asset Summary

Cash Accounts.....	\$10,114
Investment Accounts.....	\$3,247
Stocks	\$14,264
Bonds	\$300
Personal Effects.....	\$45,000
Retirement Accounts.....	\$93,855
Insurance	\$245,750
Pension Accounts	\$119,649
Annuities	\$11,303
Monies Owed to Client(s).....	\$1,500
Real Property.....	\$150,000
<hr/>	
Total.....	\$694,982

Funding Report

December 31, 2009

✓ = Verified

✍ = Need written verification

✘ = Do Not Fund/ Not Fundable/ Other

Estate Planning Review Worksheet

WILLIAM H. SAMPLE

Instructions: This worksheet contains a summary of the terms and provisions contained in your estate plan as of June 12, 2009. Please review this worksheet and note any changes or updates you would like to have made to your estate planning documents in the space provided below the section. Common issues to look for include name changes, removal of a helper, addition of a helper, or the order in which your helper's names appear. **This worksheet is NOT a substitute for your Trust Documents. You may have requested special customized language regarding who will be appointed as your Trustees and/or Agents. Please review your Trust documents located in your Red Books to verify your choices and avoid any questions you may have.**

Revocable Living Trust

Current Trustees (Article One): These are the people responsible for the management of your trust while you are alive and healthy. Typically, you should be one of the initial trustees.

WILLIAM H. SAMPLE
MARY L. SAMPLE

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Disability Panel Members (Article Four): These "helpers" are responsible for determining whether you are able to effectively manage your financial affairs. A Disability Panel Member does not have the authority to make financial and investment decisions over assets titled in your trust unless you have named them as a Disability Trustee. Please note that all of the individuals you have named as panel members serve together at the same time and work as a team.

My Disability Panel shall consist of the following named individuals:

MY SPOUSE AND
MY LIVING CHILDREN

Requires a unanimous opinion of my Disability Panel

Consultation Requirement:

Disability Panel must consult with the following named individuals to aid them in making a determination of my disability:

MY PRIMARY CARE PHYSICIAN AND
AN APPROPRIATE SPECIALIST(S) RECOMMENDED BY MY PRIMARY CARE
PHYSICIAN AND APPROVED BY MY DISABILITY PANEL

Replacement of Disability Panel Members (Article Four):

The remaining members of my Disability Panel shall serve alone.

Removal of a Member of my Disability Panel (Article Four):

By my spouse, then my Then Living Children.

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Specific Distributions of Trust Property (Article Seven):

You have indicated that you want the following specific distributions in Article 7 of your trust. Please review the following list. If you wish to make any changes, please note them in the box below.

Beneficiary	Description
Elizabeth A. Sample	Our Condo in Vail
John H. Sample	\$10,000

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Trust Beneficiaries (Article Twelve): The following people have been named as beneficiaries in Article Twelve of your living trust. Please review both the people you have named, the share they are scheduled to receive, and the type of trust share.

Beneficiary	Relationship	Share and Type
ELIZABETH A. SAMPLE	Daughter	Equal - Lifetime Protective Trust with Liberal Provisions for Access to Trust Assets
JOHN L. SAMPLE	Son	Equal - Lifetime Protective Trust with Liberal Provisions for Access to Trust Assets

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Initial Disability Trustees (Article Fifteen): These "helpers" are responsible for making financial and investment decisions over assets titled in your trust in the event you are unable to manage your financial affairs. They are also responsible for spending trust assets in accordance with the instructions you provided in your living trust. All of the "helpers" listed below shall serve as initial disability trustees.

MARY L. SAMPLE
 ELIZABETH A. SAMPLE

Disability Trustee Replacement Options (Article Fifteen):

If any one or more of the disability Trustees is unwilling or unable to serve the following shall be named as successor disability Trustees in the order in which their names appear:

JOHN L. SAMPLE

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Initial Death Trustees (Article Fifteen): These "helpers" are responsible for making financial and investment decisions over assets titled in your trust after your death and will be responsible for winding down your financial and tax affairs. All of the "helpers" listed below shall serve as initial Death trustees.

MARY L. SAMPLE
 ELIZABETH A. SAMPLE

Death Trustee Replacement Options (Article Fifteen):

The following shall be named as successor Death Trustees in the order in which their names appear:

JOHN L. SAMPLE

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Trustees of Beneficiary's Separate Trust Shares (Article Fifteen): These "helpers" are responsible for making financial and investment decisions over assets titled in the separate protected trust shares created for your beneficiaries. The beneficiary trustee typically determines the responsibilities of the Cotrustee. The instructions in your trust provide:

Beneficiary	Trustee Provision
FOR ALL BENEFICIARIES UNLESS OTHERWISE NOTED:	The beneficiary will serve as their own trustee along with a professional Cotrustee of their choice. By including the professional Cotrustee, the beneficiary will enjoy a very high degree of protection over their inheritance and can retain a high degree of control over the professional Cotrustee.

	Prior to receiving the inheritance the beneficiary must have a financial plan prepared.
--	---

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Memorandum for Distribution of Tangible Personal Property

The Memorandum for Distribution of Tangible Personal Property is a document separate from your trust that identifies specific items found in your home that you want to pass to certain individuals upon your demise. Often times these items carry significant sentimental value (i.e. wedding rings, family photo albums, family heirlooms, etc.). Distributions of cash, vehicles, real estate or other financial assets may not be distributed using a Memorandum.

Pour Over Will

Personal Representatives of your Pour Over Will: If you have maintained the funding of your living trust, the need for your Pour Over Will is greatly reduced. The Personal Representatives (also known as an executor or executrix) will be responsible for conducting a probate administration over any assets that are not funded properly in your trust. We generally recommend that these people should be the same as the people you have named as your Primary Death Trustees.

Co-Primary:

MARY L. SAMPLE

ELIZABETH A. SAMPLE

Backup:

JOHN L. SAMPLE

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Special Durable Power of Attorney

Power of Attorney Agents: The people you have named as the agents in your Special Durable Power of Attorney have very specific responsibilities during periods when you are unable to effectively manage your financial affairs. They can assist in completing the funding of your living trust, initiate or maintain a pre-existing gifting program, manage your retirement plans and perform a number of non-financial responsibilities such as filing taxes, talking with Medicare and Social Security and having your mail forwarded. We generally recommend that these people should be the same as the people you have named as your Primary Disability Trustees.

Primary:

MARY L. SAMPLE AND ELIZABETH A. SAMPLE

Backup:

JOHN L. SAMPLE

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Health Care Power of Attorney

Health Care Agent: These people are responsible for making health care decisions for you in the event that your doctor determines you are not able to make health care decisions for yourself. An authorization to release information to your "helpers" (often referred to as a HIPAA release) is included in your estate plan.

Primary:

MARY L. SAMPLE

Backup:

First, ELIZABETH A. SAMPLE

Second, JOHN H. SAMPLE

Request Change	If "Yes", Describe Change to be Made
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Authorization:

- I hereby authorize the changes described above to be made to my estate plan and it is my *intent* that these changes become effective immediately.

- I have no changes or concerns.

WILLIAM H. SAMPLE

Date

Miscellaneous Issues

Instructions: From time to time, there may be a number of miscellaneous issues that impact your estate planning. Please review the list below and check the box for any items that apply. We will review your list and take appropriate action. In many cases, we will simply note your file. For some, we may recommend that we conduct a Personal Counselling Session depending on the nature of the issue.

- I turn 70 this year and have retirement plans which I will soon be required to take distributions from
- I have changed employers and my employee benefits have changed
- I have a special health concern
- A family member has a special health concern
- I have a special financial concern
- I have a creditor problem or there is a possibility I may have a creditor problem
- A family member has a creditor problem or there is a possibility a family member may have a creditor problem
- A beneficiary of my trust has recently been married
- A beneficiary of my trust has recently been divorced or legally separated
- A beneficiary of my trust has legally changed their name, both the new and the prior name of the beneficiary are noted below
- I have a new son/daughter/grandson/granddaughter (their name is noted below)
- I have recently moved and my new address is noted below. I will confirm that you have a copy of my new deed.
- My phone number has changed, my new phone number is: () - _____
- My mobile number has changed, my new mobile number is: () - _____
- I have a new e-mail address, it is: _____
- I have changed primary care physicians (contact information noted below)
- I have a new financial advisor or accountant (contact information noted below)
- I have a personal matter I need to talk with my attorney about (please call our office to schedule an appointment)
- Other:

Recommendations/Feedback: We continue to focus on how we can improve the quality of services we provide you. If you have any ideas, suggestions, recommendations or concerns, please take a moment to note those below.
