lifespan™

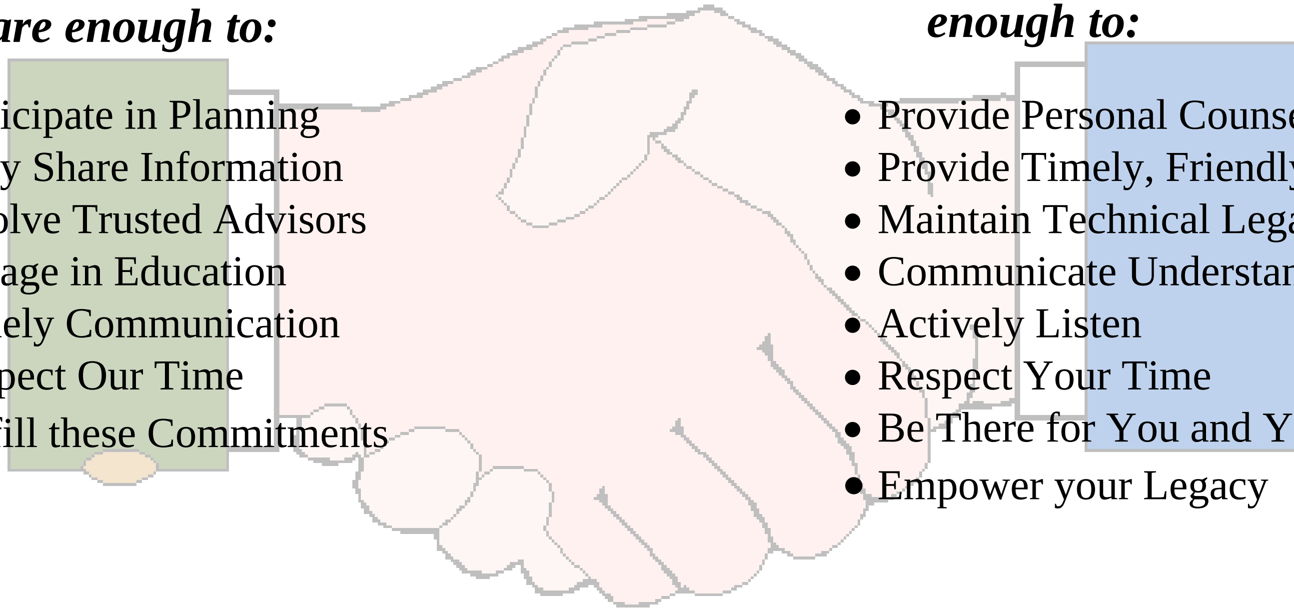
PLANS THAT WORK. PEOPLE WHO CARE.™

Tab 2

Continuous Commitment Compact™

1. The Commitment Clarifier™
2. Law Office Service Commitments
3. Client Commitments
4. Client Service Plan
5. The Ideal Week™
6. The Continuous Commitment Compact™
7. Law Firm Succession Agreement

The Commitment Clarifier™



For clients who care enough to:

- Participate in Planning
- Fully Share Information
- Involve Trusted Advisors
- Engage in Education
- Timely Communication
- Respect Our Time
- Fulfill these Commitments

We care enough to:

- Provide Personal Counselling
- Provide Timely, Friendly Service
- Maintain Technical Legal Excellence
- Communicate Understandably
- Actively Listen
- Respect Your Time
- Be There for You and Your Loved Ones
- Empower your Legacy

James D. Evans	*William H. Sample*	*Mary L. Sample*
James D. Evans	William H. Sample	Mary L. Sample

BENSON & CASE LLP
ATTORNEYS

James D. Evans
Attorney and Counsellor at Law

SERVICE COMMITMENTS

FOUNDATION DOCUMENT DELIVERY	21 DAYS
TRUST FUNDING COMPLETED	120 DAYS
RED CHECK REVIEW RETURNED	30 DAYS
AMENDMENTS COMPLETED	30 DAYS
GROUP MEETING TO DO's	90 DAYS
CUSTOMIZATION CHECKLISTS (health care, final instructions, trustee/guardian instructions, personal property memoranda)	90 DAYS
PHONE CALLS RETURNED	48 HOURS
SETTLEMENT	
ADMINISTRATIVE TRUST FUNDED	120 DAYS
DISCLAIMERS FILED	7 MONTHS
TAX RETURNS FILED (STATE & FEDERAL): ***Prepared by Client's Accountant***	9 MONTHS
SUBTRUSTS FUNDED (TAXABLE ESTATES)	120 DAYS AFTER FILING DATE

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CLIENT COMMITMENTS

Share

- Full and complete information
- Changes in personal and financial situation

Invest Time

- To learn legal concepts
- To help us apply them to your family
- To educate your family about your plan

Communicate

- To read and understand our communications
- To forward questions, concerns, articles, ideas, and suggestions

Honor & Appreciate Relationship

- By agreeing that our service commitments define quality service
- By concentrating on *overall* value of our service

Benson & Case
Attorneys and Counsellors at Law

CLIENT SERVICE PLAN

The IDEAL WEEK™
("A Standardized Approach for Individualized, Focused Service")

We pursue a concept known as the "Ideal Week" in order to better serve your needs through highly focused and targeted effort. Briefly, the Ideal Week involves implementing specifically scheduled planning and meeting time on a regular basis to address particular client service and firm planning needs.

During these times, all or part of the law firm service team will be unavailable by phone. In order to assure continued responsiveness, the phone message service will be regularly checked, and you will also have access to all firm team members through e-mail. As always, clear and "easy" questions will be answered immediately with a return call from the appropriate team member. Questions and concerns that involve legal issues will be handled on a scheduled teleconference or in-person appointment basis.

The areas we will target include Legal Support (amendments and document preparation), Settlement (asset transfer, tax preparation and advice following client death or disability), Funding (asset transfer, both upon the initial formation of the estate plan and on an as-needed basis thereafter). In addition, we are emphasizing the need for better organization and coordination among the various service tasks within the firm.

Finally, we are scheduling standard firm office hours, as well as regular planned time off. Time off includes business retreat time (once per quarter), as well as personal vacation time. We believe it is essential that our professional service team be fresh and focused, and that you are best served by knowing exactly what to expect in terms of access for assistance you require in implementing your planning.

The IDEAL WEEK™

(“A Standardized Approach for Individualized, Focused Service”)

OFFICE HOURS

Monday through Friday*
8:30 am to 5:00 p.m.

Day/Time	Task	Team Members
EVERY MONDAY (No client meetings)		
9:00 to 11:00 a.m.	Full Team Meeting	All
12:00 to 1:30 p.m.	Accounting Department Meeting	Jim & Accountant
2:00 to 4:00 p.m.	Funding, Case & Settlement Review	Jim & Staff
5:00 to 6:00 p.m.	Planning Review	Jim & Staff

OFFICE CLOSED

New Year’s Day
Memorial Day
July 4th
Labor Day
Thanksgiving Day & Day After
Christmas Eve after 12:00 noon
Christmas Day

LIFESPAN & NATIONAL NETWORK OF ESTATE PLANNING ATTORNEYS & STAFF

SPRING COLLEGIUM	(Attorney Only)	April 26 – 30, 2010
Lifespan Planning Meeting	(Attorney Only)	June 22-25, 2010
FALL COLLEGIUM	(Attorney Only)	September 20-24, 2010
Lifespan Planning Meeting	(Attorney Only)	December 2-3, 2010

FUNDING DAY

Join Anne every 1st Friday for a day of Funding. These are 45 minute in office meetings between the hours of 9:00am to 1:00pm. Please call to set your appointment.
FIRST COME FIRST SERVE!

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The Continuous Commitment Compact™

No Additional Charge for:

- **Copies**
- **Word Processing Amendments**
- **Phone Calls**
- **Red Check Review ™ of In-State Deeds**
- **Location of Out-of-State Attorneys for Out-Of-State Deeds**
- **Integrated Financial Record Keeping For Updating and Settlement**
- **Trust Funding Identification Cards**
- **Group Update Programs**
    - **Lifespan Family Reunion™ & Client Update Programs™**
- **Group Educational Programs (LifeSpan Learning Solution!™)**
- **DocuBank Membership- Emergency Medical Notification and Identification**
- **Lost Document Protection**
- **Customization of Health Care, Final arrangements & Guardian Instructions**
- **Client Document Organizer & Locator and Advisor Check List**
- **Referral to Other Partners -in- Planning, Advisors and Attorneys**

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SUCCESSION AGREEMENT REVIEW

(What Happens if Something Happens to You?)

- **Successor Attorney Tom Benson**
- **Succession Panel/ "Performance Assurance Protectors"**
  - **Team Anne Farrer**
  - **Attorney Rick Randall**
  - **Family Diane S. Evans**