

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**