



James D. Evans  
Attorney and Counsellor at Law

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## SERVICE COMMITMENTS

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|---|-------------------------------|
| 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<br>(health care, final instructions,<br>trustee/guardian instructions,<br>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):<br><i>Prepared by Client's Accountant</i>  | 9 MONTHS                      |
| SUBTRUSTS FUNDED (TAXABLE ESTATES)  | 120 DAYS AFTER<br>FILING DATE |



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## CLIENT COMMITMENTS

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### **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