

THE LAW OFFICE OF SHEILA D. BROWN

THE WEALTH *Protection*

& PROPERTY PRESERVATION
MAINTENANCE PLAN

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| CREATE | PROTECT | PRESERVE |
your

GLORIOUS INHERITANCE



THE PRIORITY PLAN
TIER 1



THE PERSEVERE PLAN
TIER 2



THE PREMIERE PLAN
TIER 3



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It's clear that you genuinely care about your family's future.

That's why you invested time and money into securing their well-being through an invaluable asset—your estate plan. But even a well-crafted estate plan isn't timeless. What I mean is that whenever a significant change occurs in your life, family, or finances, your estate plan can quickly become outdated if it's not adjusted to reflect those changes.

"FAILING TO UPDATE YOUR ESTATE PLAN AFTER SIGNIFICANT LIFE EVENTS IS A COMMON MISTAKE THAT MILLIONS OF PEOPLE MAKE EVERY DAY."

As your Wealth Protection and Property Preservation Attorney, I'm here to help ensure your legacy remains intact, so your family thrives during unexpected events—whether it's a sudden illness, death, accident, long-term care needs, or other major life changes. I do this by building genuine, ongoing relationships. As a relational attorney, I'll regularly check in with you and your family, with your permission, to ensure that together we keep your vision for the future of your family on track.

Attorney Sheila D. Brown





GLORIOUSINHERITANCE.COM



LET'S TAKE RESPONSIBILITY TOGETHER AS A TEAM.



Change is inevitable—be prepared, and let me help you.

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A Structured System To Ensure **YOUR ESTATE PLAN REMAINS UP TO DATE AND ALIGNED WITH YOUR ORIGINAL INTENTIONS.**



HOW MANY PROBLEMS ARISE FROM CREATING AN ESTATE PLAN TO ACHIEVE YOUR GOALS, ONLY TO TUCK IT AWAY—OFTEN OUT OF SIGHT—WHERE IT WON'T BE THOUGHT OF AGAIN UNTIL AFTER YOU PASS AWAY?

Let's address the issues that arise when you create a strong estate plan to achieve your family's goals, only to file it away and forget about it—until something happens, like the passing of you or your spouse. Here's the reality: relying on a lawyer to draft your estate plan and then walking away, assuming it will always be fine no matter what life throws at you, is a recipe for your estate ending up in probate court when you're gone. Change is inevitable! A skilled, relational attorney will guide you on when and how to update your plan—but only if you stay engaged.

The **Priority**, **Persevere**, and **Premier** tiers of the Wealth Protection & Property Preservation Maintenance Program provide you with continuous access to my counsel, ensuring that your estate plan evolves with your life. Through these tiers, I'll remain an active part of your family's legacy team, offering ongoing support tailored to your needs and budget. The Wealth Protection & Property Preservation Maintenance Program is more than just a solution—it's a partnership that ensures the intentions you set when first hiring me are protected and carried forward with consistency, familiarity, and lasting continuity.

Attorney Sheila D. Brown



Eligibility To Participate



If you hired the Law Office of Sheila D. Brown to design, create, and execute your estate plan, you qualify for one of three tiered plans offered through the **Wealth Protection & Property Preservation Maintenance Program.***

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*Currently, this program is not available to clients who have had portions of their estate plan done by outside firms, agencies or DIY platforms.

THE PRIORITY PLAN

TIER 1

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STAY ABREAST OF THE LATEST TRENDS

- Stay Informed Through Our Quarterly Newsletter
- Secure Client Documents Portal
- Planning Alerts (Legal and Tax Related)

COST: \$150 ANNUAL SUBSCRIPTION

Individuals or Married Couples | Prices Subject To Change With Advance Notice To Members

Stay Ahead with Ongoing Estate Plan Protection & Secure Access!

With this affordable option, you'll always have access to your estate planning documents when you need them—whether for periodic updates, reviews, or implementation. No more worrying about misplaced documents or outdated plans. This plan puts you in control, allowing you to proactively reach out to your attorney whenever you determine updates are necessary.

How It Works:

Contact the Law Office of Sheila D. Brown via email, phone, or our secure client portal to request additional legal assistance whenever needed.

Who Is This Plan Best For?

This plan is ideal for clients with simple estates who don't anticipate frequent changes in family dynamics or finances. It provides an easy and cost-effective way to stay informed about legal and tax-related updates that may impact estate documents.

Additional Benefits for All Clients:

- ✓ Complimentary Estate Planning Audit – Every 3 years upon request (\$750 Value)
- ✓ Free Successor Trustee & Family Meeting – After incapacity or passing to ensure a smooth transition
- ✓ Unlimited Free Calls & Emails with Staff – (\$375 minimum value)
- ✓ Exclusive Referral Coupon – Share with family and friends for a waived initial consultation fee when they become clients

Take control of your estate planning with confidence. Contact the Law Office of Sheila D. Brown today to enroll in this valuable program!

THE PERSEVERE PLAN

TIER 2

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FREE BASIC* LEVEL CHANGES TO YOUR ESTATE PLAN

- No Additional Charge For Name Changes of Current Fiduciaries
- 15% Discount On All Other Estate Plan Document Changes
- Annual 1-Hour Review Meeting Of Your Estate Planning Documents

COST: \$450 ANNUAL SUBSCRIPTION

Individuals or Married Couples | Prices Subject To Change With Advance Notice To Members

The Perseverance Tier: Exclusive, Ongoing Estate Plan Protection

The Perseverance Tier is designed for those who deeply value a strong, ongoing attorney-client relationship. This plan is ideal for individuals who want to ensure their trusts and estate planning documents remain up to date, accurately reflecting changes in their personal and financial lives. It is especially beneficial for those looking to minimize the risk of probate, maintain privacy, and keep their estate affairs out of the public record.

Exclusive Benefits of the Perseverance Tier:

- ✓ Everything Included in the Priority Tier Plan – Plus additional premium benefits
- ✓ Unlimited Legal Guidance – No additional charges for asking estate-related questions
- ✓ Free Name Changes in Documents – Ensure accuracy without extra fees
- ✓ Asset Titling Advice at No Cost – Guidance on how to title new assets correctly
- ✓ Flat-Fee Discounted Rates – Special pricing on more complex plan updates or advanced planning
- ✓ Annual 1-Hour Review Meeting – A dedicated session to discuss personal, legal, and financial changes impacting your plan

Additional Benefits for All Clients:

- ✓ Complimentary Estate Planning Audit – Every 3 years upon request (\$750 Value)
- ✓ Free Successor Trustee & Family Meeting – Guidance after incapacity or passing
- ✓ Unlimited Free Calls & Emails with Staff – (\$375 minimum value)
- ✓ Exclusive Referral Coupon – Share with family and friends for a waived initial consultation fee when they become clients

With the Perseverance Tier, you gain peace of mind knowing your estate plan stays aligned with your life's changes—without unexpected legal costs. Secure your legacy with confidence.

 Contact the Law Office of Sheila D. Brown today to enroll!

THE PREMIERE PLAN

TIER 3

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AN ENHANCED EXPERIENCE TO MEET YOUR NEEDS

- Make Dispositive Updates To Your Planning Docs Free Of Charge
- Other Updates To Be Provided At A 20% Discount
- Receive 15% Discounts on New Asset Titling

COST: \$1000 ANNUAL SUBSCRIPTION

Individuals or Married Couples | Prices Subject To Change With Advance Notice To Members

The Premiere Tier: The Ultimate Estate Planning Experience

For those who prioritize keeping their estate plan up to date and maximizing ongoing legal support, the Premiere Tier offers the highest level of service and flexibility. In addition to all the benefits provided in the Priority and Perseverance Tier Plans, Premiere members gain exclusive perks that ensure their estate planning remains aligned with their evolving personal and financial landscape.

Exclusive Premiere Tier Benefits:

- ✓ Annual Professional Advisors Meeting – Unlike the Perseverance Tier's one-on-one review, Premiere members can request a virtual or phone conference with their entire team of trusted advisors, including financial, insurance, and tax professionals. You may also include successor trustees or beneficiaries (with written consent to address waiver of attorney-client privilege).
- ✓ Free Dispositive Updates – Make key modifications to your estate planning documents at no additional charge.
- ✓ Exclusive Discounts on Services:
 - 20% Off All Other Estate Plan Updates – Ensure your documents evolve with your needs at a lower cost.
 - 15% Off Hands-On Asset Titling Services – Get expert assistance in properly titling newly acquired assets.

Additional Benefits for All Clients:

- ✓ Complimentary Estate Planning Audit – Every 3 years upon request (\$750 Value)
- ✓ Free Successor Trustee & Family Meeting – Essential guidance after incapacity or passing
- ✓ Unlimited Free Calls & Emails with Staff – (\$375 minimum value)
- ✓ Exclusive Referral Coupon – Share with family and friends for a waived initial consultation fee when they become clients

With the Premiere Tier, you receive unparalleled estate planning support, ensuring your legal, financial, and tax strategies work seamlessly together.

Take control of your legacy with confidence—contact the Law Office of Sheila D. Brown today to enroll!

ENROLLMENT

TWO EASY WAYS TO JOIN!

SEAMLESS ENROLLMENT IN THE WEALTH PROTECTION & PROPERTY PRESERVATION PROGRAM

Exclusive 1-Year Complimentary Enrollment

If you choose to hire the firm to create a Legacy Level Estate Plan, you will receive one year of complimentary enrollment in the Perseverance Plan (Tier 2) at no additional charge—this benefit is automatically included in your Retainer Fee on the day you sign.

Continuing Your Membership

After your 12-month trial period, you have the flexibility to continue your membership by:

- ◆ Paying the annual subscription fee on our website at GloriousInheritance.com
- ◆ Completing the annual enrollment form, which will be sent at the beginning of each year

Even if you don't choose a Legacy Level Estate Plan, you can still enroll in one of the subscription plans at any time within 12 months of executing your estate planning documents.

Pro-Rated Membership for New Clients

If you enroll later in the year, your membership fee will be prorated, ensuring you only pay for the months remaining in the current calendar year.

At the start of each new year, all members will receive an annual enrollment form. Simply complete the electronic form and submit payment to maintain access to your plan's exclusive benefits.

📞 Take the next step in protecting your legacy—contact the Law Office of Sheila D. Brown today!

During your Initial Consultation at the *Law Office of Sheila D. Brown*, you'll be introduced to the Wealth Protection & Property Preservation Program, a comprehensive subscription designed to keep your estate plan up to date and aligned with your evolving needs.

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