

Law Practice Management Resources

Client Maintenance Plan: Sample Mission Statement 2

The client maintenance program is an insurance program.

We buy insurance for things such as fire, flood, and accidental death. These are policies that, quite frankly, have a diminished likelihood that we will ever need. Yet, we wisely purchase them. In converse, the likelihood of needing auto insurance is higher and, in most states, we are required to purchase a policy.

Let us address the matter at hand. What is the likelihood that your estate plan will become out-of-date in your lifetime? We believe it is a certainty. Laws will change, your family will change, and your needs we will evolve. Due to these certain changes, we have created our Client Maintenance Program.

Our Client Maintenance Program is a proactive program. It is critical that you keep your documents updated and current in order to see that your plan accomplishes your goals over time. This form of estate planning “insurance” gives you the confidence to enjoy your life as you see fit, knowing that you are taken care of now and in the future.

As your personal and financial circumstances change, and the law that impacts your planning evolves, we will counsel you on all matters pertaining to your estate plan. As changes occur, both minor and major adjustments that have an impact on your planning, we will ensure that your plan is current. We do not want to see your intentions fail because either of us did not take the time to communicate changes of significance.

Your choices and the law can rapidly change each year. We know from our extensive experience in this area that it will impact your planning. We believe that you need your attorney to guide you through those changes and an “insurance” that pays for your attorney to be “on-call” on your case.

We are committed to being there for you and your family to make the essential changes to ensure that your plan remains consistent with your intentions for as long as you are equally committed to this program.