

# 10 Reasons to Choose Dolphin Trust as a Group (or Employee) Benefit



- 1. A benefit people will actually use** - Dolphin Trust is a legal plan centered around completing your employees' estate planning documents (wills, trusts, and powers of attorney). It's a proactive benefit - we want people to use it.
- 2. Lifetime protection** - In addition to estate planning, Dolphin Trust includes unlimited consultations on any legal matter, document review, unlimited estate planning changes, and assistance with setting up and funding the new trust. It's like having a law firm on retainer.
- 3. Unmatched value** - Dolphin Trust is \$49.99 per month for the first year and then \$9.99 per month thereafter. The first-year cost is 70% off the market rate for an estate plan (~\$2,000). The second-year cost is 50% off the market rate for an hour of attorney time (~\$250).
- 4. Choice** - We offer payroll deduction and the ability for employers to cover up to 100% of the cost. Employees who already have an estate plan may enroll for \$9.99 per month to receive the lifetime protection benefits.
- 5. One law firm** - You're only working with one law firm (ours), not a brokered list of participating firms. If an employee has a legal issue that we cannot adequately address, we will connect that employee with a trusted firm within our curated network.
- 6. 20 years of experience** - We have 20 years of experience doing over 40,000 estate plans for individuals and families throughout Michigan. Our firm also has highly-regarded litigators and transactional attorneys.
- 7. Simple and easy** - Dolphin Trust is easy to administer. At the outset, we will coordinate with your HR department to schedule education & enrollment sessions. If payroll deduction is an option, we will need to coordinate that as well. All legal services are provided directly to your employees or group members - no need for HR to get involved.
- 8. Satisfaction guarantee** - Our attorneys walk employees or group members through the process of creating an estate plan using our sophisticated online tool. We answer any and all of their questions and we do not sign any document until they are 100% satisfied.
- 9. Convenience** - Employees or group members can visit one of our 15 offices to have their documents signed and notarized, or we can arrange a visit to your workplace (or group meeting locale) for extra convenience.
- 10. Secure and private** - To keep your data safe, we use SSL technology and our servers are stored in a secured facility. Payments for Dolphin Trust are routed through Stripe, an industry-leading online payment processor used by Apple.