

But for the Plan (Estate Work Costs Much Less at the Plan)

Daniella and Frank (not their real names) were lifelong partners in their marriage. Unfortunately, when Frank (the primary Plan member) passed away, Daniella was left on her own to deal with his estate and their finances.

Daniella knew that she needed immediate help, so her first instinct was to contact their bank. When she did, she was shocked to find out that the bank's fee would be no less than \$5,500.00 for assisting her in dealing with the administration of the estate. And that did not include the legal fees that would be required for such matters as "Probate" and transferring title.

Daniella then called the CAW Legal Services Plan office in London, where she was informed that, as a surviving spouse, she was still entitled to Plan benefits, one of which was the effective, efficient and low-cost administration and assistance with her late husband's affairs.

Our London office "probated" the will, ensured that all real estate and investments were properly transferred into Daniella's name, and assisted in updating and settling other miscellaneous issues related to Frank's passing. These services cost her less than \$800.00.

What a relief ! What a savings !

But for the Plan, Daniella would not have saved over \$4,000.00 in fees.

And she has continued to use the Plan to save her money on other necessary legal services - a new will and a power of attorney.

Daniella's case demonstrates how the Plan benefit helps not only our primary members, but also loved ones that they have left behind.

*... Submitted by Ted Hopkins,
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