



The Pierro Law Group, LLC is dedicated to providing ongoing solutions to a valued group of clients, including individuals, families and small businesses, during their most wonderful and most difficult milestones.

Representing over 150 years of legal experience in the areas of Estate Planning, Trust and Estate Administration, Tax Planning and Elder Law, and with an AV rating from Martindale Hubbel, the attorneys at the Pierro Law Group take pride in serving clients effectively by taking the time to understand their individual needs, and crafting coordinated plans to ensure that they achieve their goals. PLG serves clients from its primary location in Albany, NY and in Manhattan, Utica, Hudson, Huntington, Lake Placid, Saratoga Springs, NY; Clearwater, FL, and Great Barrington, MA.



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“Good order
is the foundation
of all things”

Edmond Burke



A favorite teacher often advised:

'A place for everything and everything in its place.'

"That orderly vision is what PALMS is all about. To synchronize the moving parts of our clients' complex lives, we have integrated a secure web-based application, with extraordinary service to offer members a program that will organize, update and utilize the key information that forms the basis for their personal, financial and legal planning. The annual advisors' meeting built into the PALMS system will enable each member to achieve a level of service that only a true Family Office could match, at a small fraction of the cost."

Louis W. Pierro, Esq.

PALMS technology gives you and your team of professional advisors an invaluable tool during the development, lifetime maintenance, and after-death administration of your financial, tax and estate plan. As a PALMS member, you will have your own account on our secure web site server. Your total net worth statement and your portfolio will be updated nightly. You will have round-the-clock access to your PALMS website, including all vital documents. You will now have your own "Private Advisor Network," with all of your core advisors in the loop.

MEMBER BENEFITS: Once you have enrolled as a PALMS member, the Pierro Law Group will:

- ▲ Review your current information with you.
- ▲ Create your PALMS account on the secure web server maintained by Connect2A.
- ▲ Track the ownership and changes in ownership and beneficiary designations for all of your assets (designation of IRA beneficiaries, trust funding and other important information).
- ▲ Scan and download all important documents, assuring that all documents are available to you at a moment's notice.
- ▲ Provide administrative staff and paralegal interaction during the course of the year to update asset and profile changes whenever necessary.
- ▲ Provide you with access to your current data base via your secure internet web site whenever you wish to review your asset status and values.
- ▲ Provide you with a Total Net Worth statement and update your portfolio on a periodic basis.
- ▲ Track your Tax Cost Basis.
- ▲ Produce current data spreadsheets for your review and changes prior to your annual meeting with an attorney from the Pierro Law Group.
- ▲ Conduct an annual meeting with your core advisors from the Pierro Law Group and your other financial and tax advisors to update your data, advise you of changes in the law and recommend new planning strategies.
- ▲ Provide analysis of updates and changes in the law affecting your existing estate plan at our annual meeting and offer specific recommendations on how to address the changes.

The annual membership fee in the Professional Advisory Life Management System starts at \$850.*

* Fees are subject to change upon 30 days notice.

To view a sample PALMS Account simply:

1. Log onto www.pierrolaw.com
2. Click on Palms Info & Log-In
3. Click on Login to PALMS
4. Enter username: PAL130641 and password: sample

PALMS membership will ensure that your plans are carried out, and save you time and money in the management of your personal, financial and legal planning.



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