

DocuBank = Value

DocuBank Protects Your Clients &
Supports Your Firm All Year Long



1 Year of Protection for
Your Clients
&
Multiple Marketing Benefits
for You

[How DocuBank Works for You]



- 13 months of membership for your clients means marketing benefits for you with each client contact we make

You Enroll Client in DocuBank



- You Send* Enrollment Form to DocuBank
- Approximately Three Weeks Later....

*You can Fax, Mail or Email Client Enrollment Information

DocuBank Calls Client



- We let hem know their DocuBank card is in the mail*

* Communication Mentions You and/or Your Firm by Name

Client Receives Card




In the envelope:

- Plastic card(s)
- Paper card(s) for family
- Stickers for driver's license & health insurance card

* Communication Mentions You and/or Your Firm by Name

Client Puts Card in Wallet

- Your name and information goes with them – Everywhere!

 **Emergency Access to My Medical Directives**

CALL 800-362-8226 Or log on at www.docubank.com
See back to obtain my advance directives.

Jane B. Sample EXP: 10/31/12

MEMBER #: 987654 PIN: 3210


ALLERGIES: Penicillin, Sulfa, Latex, Peanuts

CONDITIONS: Diabetes, Heart Bypass, Asthma

Medication list on file
Organ Donor form included

EMERGENCY CONTACT
John R. Sample
cell: 610-667-0268
home: 610-667-3524
work: 866-362-8226 ext 1234
note: November-May in
Miami 305-555-1212

PROVIDED THROUGH: Elizabeth Q. Advisor, Esquire
Estate Planning and Financial Advisors, LLC • 610-667-6522
The Jane and John Sample Trust created: 3/9/02





* Card Lists You and/or Your Firm by Name

[6 Months Later...]



- Client Receives Courtesy Update Mailing *

In The Envelope:

- Letter Reminding them about the benefits of the service
- Full listing of emergency information on file for updating
- P.S. urges clients to contact you with changes to their estate

* Communication Mentions You and/or Your Firm by Name

[5 Months Later]



- DocuBank Calls Client - Courtesy Check In*

* Communication Mentions You and/or Your Firm by Name

[1 Month Later]



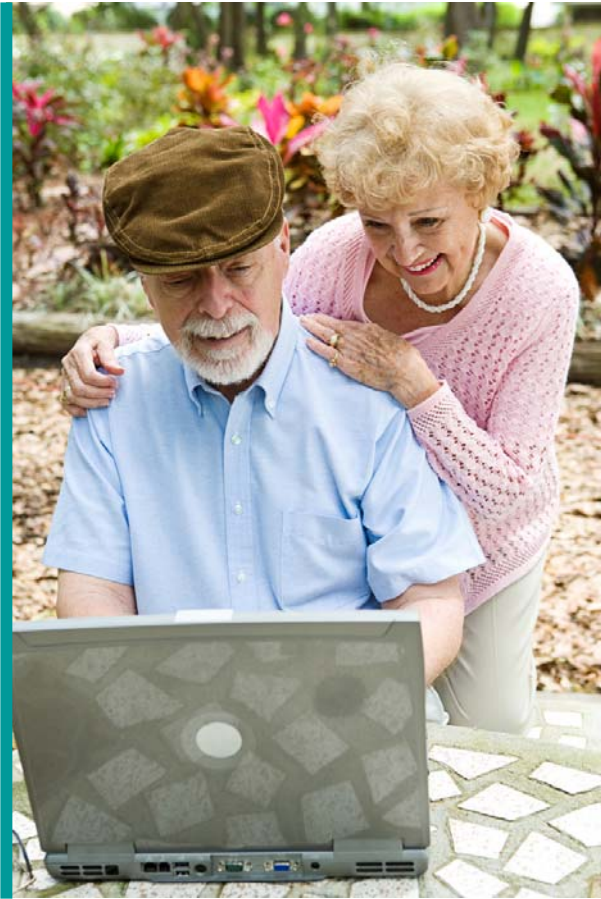
- Client Receives Renewal Mailing*

In The Envelope:

- Letter reminding them about the benefits of the service
- Full listing of emergency information on file for updating
- Renewal Invoice with discount based on relationship with YOU
- P.S. urges clients to contact you with changes to their estate

* Communication Mentions You and/or Your Firm by Name

4 Additional Service Contacts



- **Clients with email addresses** on file receive at least 4 additional service related emails – **all mention you!**

Start the Cycle Today!

Email: providers@docubank.com

Call: 610-667-3524



[Click here](#) to return to Attorney Section