TERMS OF SERVICE

CORE DOCUMENTS, INTAKE SUPPORT, AND ONE DOCUMENT REVIEW MEETING ARE INCLUDED. ADDITIONAL MEETINGS AND EXTENSIVE SUPPORT ARE NOT INCLUDED.

YOU MUST MAKE YOURSELF AVAILABLE FOR THE REVIEW MEETING WITHIN 30 DAYS OF OUR NOTICE THAT YOUR DOCUMENTS ARE READY FOR REVIEW. IF YOU DO NOT, THE MEETING IS FORFEITED, AND WE WILL PROCEED WITH DOCUMENT DELIVERY UPON YOUR EMAIL APPROVAL.

ALL SALES ARE FINAL AFTER DIGITAL DELIVERY. NO REFUNDS WILL BE ISSUED EXCEPT WHERE REQUIRED BY APPLICABLE LAW.

1. Service Overview

Guided by Planner is a document preparation package that includes administrative intake assistance and one document review meeting with a planner or paralegal. You provide the information, instructions, and planning decisions used to prepare your documents.

TrusteeFriend is not a law firm. Planner and paralegal support does not include legal advice, tax advice, attorney representation, or an attorney's review of your documents. Purchasing this package does not establish an attorney-client relationship.

2. Included Documents and Services

The package includes the following core documents and services, as applicable to your selected plan and circumstances:

- Revocable Living Trust.
- Pour-Over Will.
- Financial Power of Attorney.
- Health Care Directive, Living Will, or Health Care Proxy, as applicable.
- HIPAA Authorization.
- Nomination of Guardians, if applicable.
- Preparation of one deed for one property, subject to eligibility and receipt of the required documents.
- Estate planning binder.
- One intake support call.
- One document review meeting with a planner or paralegal.
- Limited administrative account support.

Document titles and formats may vary by state. Your order confirmation identifies any expressly agreed modifications to the package.

3. Intake Support

Your package includes one intake support call, limited to the duration stated in your booking confirmation. This call helps you complete the questionnaire, identify information needed for preparation, and communicate your instructions.

You remain responsible for your planning decisions. Intake support does not include legal analysis, tax advice, or recommendations about which legal arrangements you should select.

4. Included Document Review Meeting

Your package includes **one document review meeting**, limited to the duration stated in your booking confirmation.

The meeting provides an opportunity to review the prepared documents with a planner or paralegal, confirm that the documents reflect your submitted information and instructions, identify preparation errors, and discuss administrative signing and completion steps.

This meeting is not an attorney review, legal opinion, or guarantee of legal sufficiency. Questions requiring legal advice or substantive legal analysis require an appropriately licensed attorney.

Additional meetings, repeat walkthroughs, separate meetings for individual family members, and consultation time beyond the included appointment are not included.

5. Thirty-Day Review Meeting Deadline and Forfeiture

You must make yourself available to attend the included review meeting **within 30 calendar days after we email you that your documents are ready for review and invite you to schedule**.

You are responsible for monitoring your email, responding to scheduling communications, and selecting an available appointment within that period. Requesting an appointment after the deadline does not preserve the included meeting.

If you do not make yourself available within the 30-day period, **you forfeit the included review meeting**. The forfeited meeting has no cash value and does not create a refund, discount, or credit toward other services.

This forfeiture applies when the delay results from your unavailability or failure to respond. It does not apply when TrusteeFriend cannot offer an appointment within the period or agrees in writing to an extension.

6. Delivery Following Forfeiture

If the review meeting is forfeited, we will request your email approval to proceed with document delivery without the meeting.

After receiving your email approval, we will deliver the prepared documents digitally and proceed with binder production and shipment, subject to required payment and receipt of any outstanding information.

Silence does not constitute approval. If you do not provide email approval, delivery may remain pending.

Approval to proceed without the meeting does not restore the forfeited appointment. A later review meeting will require a separately purchased service at the price disclosed before scheduling.

7. Phone Calls, Email, and Additional Support

Support is limited to the included intake call, one review meeting, and routine administrative email assistance.

Routine email assistance covers account access, submitting requested information, scheduling, order status, and reporting preparation errors.

Unlimited calls, extensive email correspondence, repeated explanations, ongoing planning discussions, and additional document review meetings are not included.

Assignment of an account manager does not provide unlimited consultation time or ongoing case management. Requests exceeding the package's scope require a separately purchased service or upgrade under Section 16.

8. Your Information and Planning Decisions

You are responsible for providing complete and accurate information, including legal names, family relationships, property information, beneficiaries, fiduciary appointments, and distribution instructions.

TrusteeFriend may request clarification of incomplete or inconsistent instructions. Planners and paralegals do not select beneficiaries, determine distributions, or provide legal strategies.

Missing information, conflicting instructions, or changes to your decisions may delay preparation and completion.

9. Document Review and Corrections

You must review all prepared documents before signing and promptly report discrepancies between your submitted instructions and the documents.

Corrections of TrusteeFriend preparation errors are included, including when the review meeting has been forfeited.

Changes to your original instructions, new planning decisions, additional documents, or revisions requested after preparation may require additional fees. Any additional charge will be disclosed for your approval before that work proceeds.

Administrative corrections do not include an attorney's review or an assessment of whether your planning decisions are legally or financially appropriate.

10. Included Deed Preparation

Preparation of one deed for one property is included, subject to the property's location, ownership, and suitability for this service. You must provide the complete current recorded deed, including its legal description and attachments, and requested supporting information.

The included deed service does not cover title research, ownership disputes, probate, title defects, or transfers requiring additional legal work.

Notarization, the $50 electronic recording processing service, county recording fees, transfer taxes, and additional deeds are separate charges unless expressly included in your order.

The $50 electronic recording processing fee covers administrative handling, processing, and applicable postage and shipping. It does not include the county's actual recording fee, which is billed upon successful recording.

Deed preparation or submission does not guarantee county acceptance or successful recording.

11. Signing, Notarization, and Witnesses

You are responsible for arranging signing, qualified witnesses, and notarization according to the instructions provided. Notary services, witness services, and supervised signing assistance are not included unless expressly purchased.

The document review meeting is not a signing or notarization appointment. Receiving documents or a binder does not complete the signing process.

You are responsible for ensuring that all required signatures, witnesses, and notarizations are completed.

12. Trust Funding

You are responsible for completing the steps necessary to fund your trust, including appropriate ownership changes, account transfers, and beneficiary designation updates.

Except for expressly purchased services, TrusteeFriend does not contact financial institutions, transfer accounts, change beneficiary designations, or verify that assets have been transferred to your trust.

Preparation of a trust or deed does not establish that your trust is fully funded.

13. Matters Outside the Package

This package does not include attorney review, customized legal strategies, contested matters, probate administration, trust administration, business succession planning, estate tax planning, special needs planning, Medicaid or other public benefits planning, asset protection advice, or analysis of complex family or property arrangements.

If your circumstances require services outside this package, additional professional assistance or a different package may be necessary. Proposed additional work and fees will be disclosed before proceeding.

14. Preparation, Delivery, and Refund Policy

Preparation depends on receipt of a completed questionnaire, required supporting documents, clear instructions, and required payment. Stated turnaround times are estimates unless expressly confirmed otherwise in writing.

Binder production and shipping are subject to separate processing and delivery times.

ALL SALES ARE FINAL ONCE YOUR PREPARED ESTATE PLAN DOCUMENTS HAVE BEEN DELIVERED DIGITALLY. ZERO REFUNDS WILL BE ISSUED AFTER DIGITAL DELIVERY, EXCEPT WHERE REQUIRED BY APPLICABLE LAW.

Digital delivery includes sending your prepared documents by email or making them available through your client account or a download link with notice to you.

This policy applies whether or not you open, download, print, sign, notarize, or use the documents. Delivery of a physical binder is not required for this policy to take effect.

Changing your mind, deciding not to sign, purchasing another service, requesting changes, or failing to attend the review meeting does not create a refund entitlement after digital delivery.

Digital delivery does not cancel an included review meeting that remains available under Section 5. TrusteeFriend will address preparation errors under Section 9. Nothing in this policy limits rights that cannot lawfully be waived.

15. No Guarantee of Correctness, Legal Sufficiency, or Outcome

TrusteeFriend does not promise or guarantee that the prepared documents are error-free, complete, legally sufficient, or suitable for your particular circumstances.

Documents are prepared from your information and instructions using standardized templates. A planner or paralegal review does not constitute an attorney's independent verification of your planning decisions or completed documents.

You are responsible for reviewing the documents before signing, reporting discrepancies, and obtaining independent legal or tax advice when needed. TrusteeFriend will correct its preparation errors as described in Section 9.

TrusteeFriend does not guarantee enforceability, avoidance of probate, particular tax treatment, eligibility for public benefits, protection from creditors, or acceptance by a court, financial institution, recording office, or other third party.

Results depend on your circumstances, the information provided, proper execution, trust funding, applicable law, and actions taken by you and third parties.

Nothing in these terms excludes obligations or limits rights that cannot lawfully be excluded or limited.

16. Additional Services and Required Upgrades

If your needs exceed Guided by Planner's support limits, continued assistance will require a separately purchased service or an upgrade appropriate to your circumstances.

Additional administrative meetings or support may be separately quoted. Attorney involvement may require an upgrade to Guided by Attorney within that package's stated scope. Legal advice or representation requires acceptance by an appropriately licensed attorney and a separate attorney engagement agreement. Specialized matters may require a separately quoted attorney-led service.

We will explain the additional scope and fee before proceeding. **Additional work begins only after you approve the service or upgrade and arrange payment.** You will not be automatically charged without authorization.

If you decline, support remains limited to Guided by Planner. Work requiring additional assistance may be paused until you provide complete instructions or obtain appropriate professional guidance.

Declining additional services does not create a right to a refund after digital delivery, except where required by applicable law.

17. Future Updates and Ongoing Support

The package does not include ongoing monitoring of changes in law or your personal circumstances, future amendments or restatements, or assistance after incapacity or death.

You are responsible for seeking appropriate review when your circumstances or goals change. Future updates and additional services require a separate purchase or agreement.

18. Acknowledgment

By purchasing Guided by Planner, you acknowledge and agree that:

- The package includes core documents, one intake support call, one planner or paralegal review meeting, and limited administrative support.
- **You must make yourself available for the review meeting within 30 calendar days of our emailed readiness and scheduling notice, or the meeting is forfeited, subject to Section 5.**
- **After forfeiture, we will proceed with document delivery upon your email approval.**
- A forfeited meeting does not create a refund, discount, or credit.
- Additional calls, meetings, and extensive email support are not included.
- Planner and paralegal assistance does not include legal advice or attorney review.
- You are responsible for accurate information, planning decisions, reviewing and signing documents, arranging witnesses and notarization, and completing trust funding.
- TrusteeFriend does not guarantee correctness, legal sufficiency, or any particular outcome.
- Additional services and third-party charges are separate unless expressly included in your order.
- **Once your prepared documents are delivered digitally, all sales are final and no refunds will be issued, except where required by applicable law.**