TERMS OF SERVICE

THIS PACKAGE INCLUDES CORE ESTATE PLANNING DOCUMENTS, ONE INTAKE SUPPORT CALL, ONE GENERAL INFORMATION AND DOCUMENT SUPPORT MEETING WITH AN ATTORNEY, AND ONE STANDARD NOTARY APPOINTMENT.

ATTORNEY PARTICIPATION IS FOR GENERAL INFORMATION, DOCUMENT EXPLANATION, AND SUPPORT ONLY. THE ATTORNEY IS NOT PROMISED TO BE LICENSED IN YOUR STATE OR JURISDICTION. THIS PACKAGE DOES NOT INCLUDE INDIVIDUALIZED LEGAL ADVICE, STATE-SPECIFIC LEGAL REVIEW, OR LEGAL REPRESENTATION AND IS NOT INTENDED TO CREATE AN ATTORNEY-CLIENT RELATIONSHIP.

YOU MUST MAKE YOURSELF AVAILABLE FOR THE INCLUDED ATTORNEY MEETING WITHIN 30 DAYS OF OUR EMAILED READINESS AND SCHEDULING NOTICE. FAILURE TO DO SO RESULTS IN FORFEITURE, SUBJECT TO THE EXCEPTIONS BELOW. DOCUMENT DELIVERY WILL THEN PROCEED UPON YOUR EMAIL APPROVAL.

MISSING A CONFIRMED ATTORNEY OR NOTARY APPOINTMENT RESULTS IN FORFEITURE OF THAT APPOINTMENT, SUBJECT TO THE TERMS AND EXCEPTIONS BELOW.

ALL SALES ARE FINAL AFTER DIGITAL DELIVERY. ZERO REFUNDS WILL BE ISSUED EXCEPT WHERE REQUIRED BY APPLICABLE LAW.

1. Service Overview

Guided by Attorney is a document preparation package that includes administrative intake assistance, one general information and document support meeting with an attorney, and coordination of one standard notary appointment through our provider, Snapdocs.

You provide the information, instructions, and planning decisions used to prepare your documents. Services are limited to the scope described in these terms and your order confirmation.

TrusteeFriend is not a law firm. The package name describes the inclusion of an educational meeting with an attorney; it does not mean that an attorney represents you, prepares a customized legal strategy for you, or certifies your plan's compliance with applicable law.

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 required documents.
- Estate planning binder.
- One intake support call.
- One general information and document support meeting with an attorney.
- Coordination of one standard notary appointment through Snapdocs.
- Limited administrative account support.

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

The included attorney meeting replaces the planner review meeting. Separate planner and attorney meetings are not included unless expressly confirmed in writing.

3. Intake Support

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

TrusteeFriend's administrative staff, planners, and paralegals do not provide legal or tax advice.

Additional intake calls or consultation time are not included unless expressly confirmed in writing.

4. Included General Information and Document Support Meeting

Your package includes **one meeting with an attorney**, limited to the duration stated in your booking confirmation.

The meeting provides general explanations of your prepared documents, discussion of your stated instructions, identification of apparent inconsistencies, and general information concerning completion of your plan.

The attorney may explain common estate planning concepts and document functions and identify questions you may wish to discuss with an attorney you separately retain.

The meeting does not include individualized legal advice, jurisdiction-specific compliance review, an opinion on legal validity or enforceability, or recommendations about which legal strategies you should choose.

The meeting does not constitute a comprehensive review of your financial affairs, property ownership, tax circumstances, beneficiary designations, or existing legal obligations.

Additional meetings, calls, extensive email correspondence, outside document review, research, and written opinions are not included. Unused meeting time has no cash value and cannot be carried forward.

5. Attorney Participation, Jurisdiction, and No Attorney-Client Relationship

THE PARTICIPATING ATTORNEY IS NOT PROMISED TO BE LICENSED IN YOUR STATE OR JURISDICTION. THIS SERVICE IS NOT A REVIEW FOR COMPLIANCE WITH THE LAWS OF YOUR JURISDICTION.

The attorney participates in an educational and general support capacity. The attorney does not act as your legal counsel, determine whether your plan is appropriate for your particular legal circumstances, or certify that your documents satisfy applicable legal requirements.

Neither purchasing this package nor participating in the included meeting is intended to establish an attorney-client relationship with TrusteeFriend or the participating attorney. The package does not include legal representation, ongoing professional monitoring, or availability for future legal matters.

Do not assume that communications during this service are protected by attorney-client privilege. Information will be handled according to applicable privacy and confidentiality requirements.

If you need individualized legal advice, state-specific analysis, or representation, you must separately engage an attorney licensed in the appropriate jurisdiction. That service is outside this package and requires a separate agreement.

The actual nature of the services and applicable law govern whether professional duties or an attorney-client relationship arise. These terms do not override those requirements or an attorney's applicable professional obligations.

6. Thirty-Day Attorney Meeting Deadline

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

You are responsible for monitoring your email, responding to scheduling communications, providing requested information, and selecting an available appointment within that period.

Merely responding or requesting an appointment after the deadline does not preserve the included meeting.

Failure to make yourself available within the 30-day period results in forfeiture of the included attorney meeting.

Forfeiture does not apply when TrusteeFriend or the participating attorney cannot offer a reasonable appointment within that period or when an extension is confirmed in writing.

7. Attorney Appointment Attendance, Cancellation, and Forfeiture

A confirmed appointment reserves time specifically for you.

Missing the appointment without timely cancellation results in forfeiture of the included meeting, subject to applicable law and the exceptions below.

Cancellation or rescheduling requests must be received at least **24 hours before the confirmed appointment**. Requests received less than 24 hours before the appointment may be treated as a missed appointment and result in forfeiture unless an exception is confirmed in writing.

You must join on time, remain available for the scheduled duration, and have the necessary documents and information accessible. Late arrival does not extend the appointment. If insufficient time remains to conduct a meaningful meeting, the appointment may be treated as missed.

For a joint plan, both spouses must attend unless otherwise agreed in advance.

A forfeited meeting:

- Has no cash value and creates no package discount or transferable credit.
- Does not entitle you to a replacement appointment at no charge.
- May be replaced through a separately purchased appointment, subject to availability.

The replacement fee will be disclosed before booking. A missed appointment does not automatically authorize a charge to your payment method.

Appointments canceled by TrusteeFriend or the participating attorney, or prevented by a provider-side technical failure, will be rescheduled without forfeiture. Documented emergencies or other exceptional circumstances may be considered individually.

8. Delivery Following Forfeiture

If the attorney meeting is forfeited because of the scheduling deadline or a missed appointment, we will request your email approval to proceed without that meeting.

Your email approval acknowledges that you are choosing document delivery without completing the included general information and document support meeting.

We will not represent that an attorney meeting or review occurred if it did not. Participation in the meeting, when completed, does not constitute attorney approval or certification of your documents.

After receiving approval, we will proceed with digital delivery, binder production and shipment, and notary coordination, subject to payment, complete information, and applicable requirements.

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

Forfeiture of the attorney meeting does not, by itself, cancel the included notary appointment. A later attorney meeting requires a separately purchased service.

Email approval does not require TrusteeFriend or a participating provider to proceed with an unresolved issue contrary to applicable law or professional obligations.

9. Phone Calls, Email, and Support Limits

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

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

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

Sending questions by email does not expand the service's scope or create an entitlement to additional attorney time. Questions requiring individualized legal advice must be directed to an attorney you separately retain.

Assignment of an account manager does not provide unlimited consultation time or ongoing case management.

10. Your Information, Instructions, and Planning Decisions

You are responsible for providing complete and accurate information, including:

- Legal names and contact information.
- Marital status and family relationships.
- Children, dependents, and intended beneficiaries.
- Proposed trustees, executors, agents, and guardians.
- Assets, property ownership, and relevant existing documents.
- Distribution instructions and planning goals.
- Circumstances that may affect the requested plan.

You must provide existing trusts, amendments, agreements, court orders, deeds, or other documents requested for preparation.

You remain responsible for your planning decisions. TrusteeFriend does not select beneficiaries, determine distributions, or choose legal strategies for you.

Missing information, undisclosed circumstances, conflicting instructions, or changes to your decisions may affect the documents, delay completion, or require additional services.

11. Married Joint Plans and Conflicting Instructions

For a married joint plan, both spouses must provide the information and approvals necessary to complete the package. The included attorney meeting is one joint appointment rather than separate meetings.

The meeting does not create joint legal representation or provide separate legal advice to either spouse.

Conflicting instructions, disagreements between spouses, or questions about competing interests may require separate legal counsel or suspension of preparation until clear, consistent instructions are provided.

Do not use the joint meeting to communicate information you expect to be withheld from the other participating spouse.

12. Document Review, Corrections, and Revisions

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 attorney meeting has been forfeited.

Apparent inconsistencies may be identified during the included meeting. Substantial redrafting, new planning strategies, additional documents, or changes to your original instructions may require a separate quote.

Questions requiring individualized legal judgment must be addressed through separately retained counsel.

Changes requested after approval, printing, shipment, or signing may require revised documents, replacement materials, another notary appointment, or other additional services. Any additional charges will be disclosed for your approval before work proceeds.

13. 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, along with requested supporting information.

The included service does not cover title searches, title insurance, boundary questions, ownership disputes, liens, probate, title defects, or transfers requiring additional legal work.

The $50 electronic recording processing fee, county recording fees, transfer taxes, additional deeds, and services outside the agreed scope are separate unless expressly included in your order.

The $50 processing fee covers administrative handling, processing, and applicable postage and shipping. The county's actual recording fee is separate and billed upon successful recording.

Preparation, notarization, or submission of a deed does not guarantee county acceptance, successful recording, or a particular legal or tax result.

14. Included Notary Service

Your package includes coordination of **one standard notary appointment** for the package documents through our provider, Snapdocs.

The appointment's location, date, and time must be confirmed before it is considered scheduled. Appointments are subject to notary availability, and requested dates and times are not guaranteed.

The included appointment has no separate cash value and cannot be exchanged for a package discount or credit toward another service, except where required by law.

Any proposed additional charge for special travel, unusual scheduling, additional locations, or services beyond the included appointment will be disclosed for approval before it is incurred.

The notary is an independent service provider. Notarial duties and decisions are governed by applicable law.

15. Notary Appointment Preparation and Signer Responsibilities

You are responsible for ensuring that:

- Complete documents are ready in the required format.
- All required signers are present and available at the confirmed time and location.
- Each signer provides identification acceptable to the notary under applicable requirements.
- Required qualified witnesses attend.
- Names and other document details have been reviewed before the appointment.
- Signers can communicate and participate as required for the requested notarial acts.
- The notary can access the confirmed appointment location.

Do not sign documents requiring notarization beforehand unless instructed by the notary.

Notify us before scheduling of language, accessibility, location, or other needs requiring special arrangements. Additional services and fees will be disclosed before approval.

The notary may decline to proceed if identification, willingness, capacity, document readiness, or other applicable requirements are not satisfied.

16. Witnesses

Witness services are not included unless expressly confirmed in writing.

You are responsible for arranging qualified witnesses according to the signing instructions. Do not assume the assigned notary will supply witnesses or serve as a witness.

The notary's attendance does not eliminate separate witness requirements. Whether the notary may also act as a witness depends on applicable requirements and provider arrangements.

If required witnesses are absent or unqualified and the appointment cannot be completed, the appointment may be forfeited under Section 17.

Requested witness services are subject to availability and a separately disclosed fee.

17. Notary Attendance, Cancellation, Rescheduling, and Forfeiture

Missing a confirmed notary appointment results in forfeiture of the included appointment.

Cancellation or rescheduling requests must be received at least **24 hours before the confirmed appointment**. A request received less than 24 hours before the appointment, or after the notary has begun traveling, may result in forfeiture. Any additional provider cancellation terms will be disclosed when scheduling.

An appointment may also be forfeited if completion is prevented by your failure to provide:

- Required signers or qualified witnesses.
- Acceptable identification.
- Complete documents in the required format.
- Access to the confirmed location.
- Other signing requirements communicated before the appointment.

Late arrival does not guarantee an extension. A notary is not required to remain beyond the reserved appointment time or return without a new booking.

A forfeited or client-caused incomplete appointment does not include a free replacement visit. Another appointment requires a separately purchased service at the price disclosed before scheduling.

Forfeiture does not apply when the appointment cannot be completed because of a TrusteeFriend preparation error, notary error, provider cancellation, or other provider-side failure. In those circumstances, we will coordinate an appropriate replacement without charging you for a duplicate standard appointment.

Documented emergencies and exceptional circumstances may be considered individually. No additional charge will be imposed without disclosure and authorization.

18. Scope of Notarization and No Guarantee of Completion

The notary performs applicable notarial acts. Notary service does not include legal advice, drafting or revisions, deed recording, title research, or verification that your estate plan is legally sufficient or fully funded.

Notarization does not establish a document's legal validity or satisfy separate witness requirements.

Neither purchase of the package nor confirmation of an appointment guarantees that every document will be signed or notarized during the visit.

Completion depends on document readiness, signer participation, applicable requirements, and the notary's independent determination that the requested acts may be performed.

The notary is not required to proceed when legal requirements are unmet.

19. Signing and Execution Responsibilities

You are responsible for following the signing instructions and ensuring that all required signatures, witnesses, and notarizations are completed.

The attorney meeting is not a signing appointment unless expressly arranged as such. Receipt of documents, participation in a meeting, or delivery of a binder does not complete execution.

If you identify an error or have an unresolved question affecting signing, notify us before executing the affected document. Questions about legal validity or state-specific execution requirements may require advice from separately retained local counsel.

20. Trust Funding and Beneficiary Designations

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, obtain lender or insurer approvals, or verify that assets have been transferred to your trust.

The included attorney meeting does not include individualized advice about asset transfers, beneficiary designations, tax consequences, or the suitability of particular funding decisions.

Preparation of a trust, listing assets on a schedule, or preparing a deed does not establish that your trust is fully funded.

21. Matters Outside the Package

Unless separately agreed in writing, this package does not include:

- Individualized legal or tax advice.
- State-specific legal compliance review.
- Legal representation or an attorney-client engagement.
- Certification of document validity, enforceability, or suitability.
- Additional attorney or administrative meetings.
- Litigation, contested matters