

Estate Guru Client Disclosure

I/we _____ were referred to Estate Guru by

_____.

By signing below I/we acknowledge and understand the following regarding the purchase of our estate planning documents from Estate Guru, LLC.

- 1) The attorney assigned to our file is practicing law via the online estate planning software known and disclosed to us as Estate Guru, LLC.
- 2) If our situation is deemed by the attorney to be too complex, Estate Guru, LLC. may not be able to complete our documents using the online platform/tool and the assigned attorney will contact us to discuss the complexities and determine the best way to move forward.
- 3) I/We will be under no obligation to complete our estate planning documents using either the Estate Guru, LLC. platform/tool or the assigned Estate Guru attorney.
- 4) Neither our advisor nor the person(s) assisting us at Estate Guru, LLC. are attorneys.
- 5) I/We have been encouraged to seek in-person legal counsel if at any time we become uncomfortable with this process.
- 6) Fees paid to Estate Guru, LLC. and/or our financial advisor include but are not limited to the following:
 - a) Payment of the attorney
 - b) Preparation and shipment of our documents
 - c) Non-legal assistance in navigation of the online interview, entry of our data and answers to the interview questions.
 - d) Non-legal assistance in the funding of our trust if applicable
 - e) Setup, training and ongoing support for use and access to our documents via our online dashboard which contains our estate planning documents.
- 7) The definition of "Funding" is: the transferring of ownership of an asset(s) to our trust.
- 8) I/We understand that the funding and execution of our estate plan is our responsibility.

Acknowledged:

Signature

Date

Signature

Date

Print Name

Print Name
