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Billing Steps for Optional Add-On Services

Dec Law (Deed Preparation)

Client:

- Log into your account
- Click on your initials in the upper right-hand corner
- Select "Consult an Attorney"
- Choose "I need help transferring real estate into my trust" from the options

After Request Submission:

- Client receives an estimate for deed preparation ($175 per deed + recording fees)
- Once they approve the estimate, we send a payment link to complete the request directly with Dec Law

Advisor Payment Options:

Advisors can cover these costs. If the advisor is included in the correspondence when the client submits their consultation request, they'll receive email notifications and can choose to pay on behalf of the client using the payment link provided

Important Note:

For deed preparation requests specifically, the advisor must be present when the client completes the request to assist with payment

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Print & Ship

Advisor Side:

Select the documents you want to print, shipping and billing details are requested, then processed by the advisor.

Client Side:

Once they've completed the creation of their documents, they will click "validate your documents", one of the options on the next page is "Print and Ship", select the documents they want to print, it will also request shipping details and billing information, then processed by the client.

Attorney Network

Client:

After a client requests an attorney consultation, they're guided through prompts to provide details needed for matching with an attorney in their state. Once the request is submitted, our team connects the client with a suitable attorney. Before the introduction, the client receives an estimated flat rate and a list of required documentation to determine if they would like to move forward.

Advisors aren't automatically cc'd on communications. However, clients can choose to include their advisor during the request process. If selected, the advisor will be copied on correspondence and notified when the introduction is made.

Payment for an attorney consultation is collected after the client submits a request and decides to move forward. At that point, a payment link is sent via email. If the advisor is included in the correspondence, they can use this link to pay for the consultation on the client's behalf.

Mobile Notary

1. The advisor will initially create a **Sign Here Ink account** and submit orders on behalf of the client.
    a. The advisor can start this process when their client's documents are reflected as Ready to Sign in the client's Overview tab. You will see a Request Notary option once the document has reached this status.
    b. Clients may also notify their advisor they would like to schedule a mobile notary by selecting the Request Notary option next to their documents. In this instance, advisors will receive an email notification from their client.
2. Once the order is submitted, Sign Here Ink contacts the advisor, assigns a mobile notary, and coordinates scheduling with the client.
3. A trust-certified notary meets with the client and guides them through their document signing until the process is complete.
4. The notary uploads scans of completed documents for the advisor, leaving the originals with the client.
5. Sign Here Ink sends an invoice to the advisor, payable within 30 days.