Requesting an Attorney Consultation

3 TYPES OF REFERRALS

CONSULTATION

30-minute consultations with an in-network attorney at a pre-negotiated rate of $240

PROCESS: Once a client has submitted a request to Consult an Attorney within the wealth.com platform, they can typically expect to receive a response within 1 business day. They are able to make a note to include their advisors on communications should they desire to do so. A member of wealth.com will ask questions to understand the clients' circumstance to match them with the appropriate attorney referral for their state and situation. Before introducing the client to the attorney, the client will receive a Limited Scope Representation Agreement and a Conflict for signature via Docusign. The attorney will run a conflict check and alert us when it has been cleared. Following this, we will make a warm introduction.

What to expect on these calls: Clients are welcome to send any documents they would like to discuss with the attorney before the call, with the understanding that attorneys are not required to review these documents before their scheduled meeting. Wealth.com does not send clients' documents in advance. These sessions are best suited for clients who are looking to ask questions in regards to their current or upcoming estate plan. Any request for drafting from the attorney will be an additional charge billed directly from the attorney's office. At this point, the client could choose to continue their relationship with the attorney outside of the wealth.com platform.

What NOT to expect on these calls: Clients will not receive any bespoke drafting within these 30 minutes. We are happy to make a direct referral for clients looking for these services, but it should not be expected to be included in the 30 minute session scheduled with the attorney. The client can certainly request to continue to work with the attorney after the consultation, but should expect to pay the attorney's rates for their services.

DIRECT REFERRALS

Direct Referral to Attorney for Bespoke Drafting

PROCESS: When a client is looking for bespoke drafting services (ex: The creation of a SNT, GRAT, SLAT, ILIT or to make an addendum or change to their estate plan that exceeds the scope of wealth.com's offerings), we are more than happy to assist with a direct referral to one of our partnered attorneys. Once a client has submitted a request to Consult an Attorney and specifies what they are hoping to accomplish within the wealth.com platform, they can typically expect to receive a response within 24 business hours. A member of wealth.com will ask questions to understand the clients' circumstance to match them with the appropriate attorney referral for their state and situation. At this point, a direct referral will be made upon the client's approval. After the introduction, any charges would be billed from the attorney's office - not wealth.com.

Direct Referral to Attorney for Deed Preparation

PROCESS: When a client is looking to transfer real estate into the name of their trust, they can submit a request to Consult an Attorney on the platform and can typically expect to receive a response within 1 business day. After they communicate the number of properties and in which state(s) the properties are located, a member of the wealth.com team will provide estimates for each transfer and ask if the client would like to proceed with an introduction. This is an estimate only, as the prices for deed preparation services may vary depending on a wide variety of circumstances that will only be known once the attorney is able to understand the history and pull the title of the property. From that point forward, the client may coordinate with the attorney on the transfer and any invoices will come directly from the attorney's office.

Common Use Cases

Clients that have completed their drafting on wealth.com and have questions about specific provisions in their document.

- Clients are strongly encouraged to make a list of questions in preparation of the consultation so that the attorney can address their questions in a timely manner. It may be prudent in some cases to wait until the client has drafted their documents through wealth.com before consulting an attorney. This way, the client can make the best use of the consultation by presenting a complete set of questions. We do send the questions we are aware of to the attorney ahead of time so that there is the most efficient use of time made.

- If a client has a previous plan, and legal questions about changes they want to make, scheduling a consult is perfectly suitable for a client that is looking to update their estate plan. They could elect to get started on the platform so they understand the capabilities and output.

Clients with questions about owning a business and how that should be reflected in their estate plan.

Clients with questions about how to fund a trust / what assets they should move to their trust.

- Our attorney network can also be used to facilitate deed preparation to fund a trust with real property. A meeting to prepare a deed is NOT a consultation; instead, deed preparation is a separate engagement with its own cost. However, questions about how to fund a trust or what assets to include can absolutely be covered in a consult.

- The prices for deed preparation services vary from state to state and by attorney. We provide estimates before making any referrals with the understanding that this is an estimate only, and that the final cost will be provided by the attorney partner once they have the specific property information.

Please Note:

- Clients are welcome to send their documents in advance of the meeting, but we cannot guarantee the attorney will review the documents in advance as their commitment is to a 30 min consultation over the phone or during an in-person meeting.

- Clients will not receive any custom drafting within these 30 minutes, or edits to their documents drafted on wealth.com.

- Attorneys typically will not make addendums to a trust or last will and testament they did not draft, but it is at their discretion. We are happy to make a direct referral for clients looking for these services, but drafting should not be expected to be included in the 30 minute session scheduled with the attorney.

- Clients should have an idea of their questions and goals before meeting with the attorney. If they have not started drafting at all, or made use of the platform, we don't recommend a consultation.

- The client can certainly request to continue to work with the attorney directly after the consultation, but should expect to pay the attorney's rates for their services.

- A client will always be recommended to speak with an attorney if they indicate they are planning for a beneficiary with "special needs" (i.e., the beneficiary is disabled or potentially eligible for needs-based governmental benefits). While in some cases a consultation will be adequate, it is common that a "Special Needs Trust" may need to be incorporated into the client's plan through custom drafting or a standalone trust. We often provide both consultation and direct referral information for this use case.

- **For any wealth.com member looking to create or consult on a special needs trust, this will be considered an outright referral and the attorney's rates will apply.**

- **If a member hopes to have their wealth.com documents reviewed by an attorney, one full hour is required (pre-negotiated rate of $480 for one hour) If a member is looking for a document review of a non-wealth.com document, this will be considered a direct referral to an attorney and their firm rates will apply.**