



LIFEBOOK MEMBERSHIP AGREEMENT

Terms and Conditions

Effective Date: July 4, 2026

This Lifebook Membership Agreement ("Agreement") is entered into between Sunshine State Law, PLLC, a Florida law firm ("Firm," "we," "our," or "us"), and the individual identified during enrollment ("Member," "you," or "your").

By enrolling in Lifebook and paying the applicable membership fee, you agree to the terms and conditions set forth below.

1. PURPOSE OF MEMBERSHIP

Lifebook is an ongoing estate planning membership program designed to provide Members with access to estate planning resources, document storage, periodic legal consultations, and other membership benefits as described herein.

Lifebook is not insurance, a prepaid legal services plan regulated by the State of Florida, nor a guarantee of unlimited legal representation.

Membership benefits are available only while the membership remains active and in good standing.

2. ELIGIBILITY

To enroll in Lifebook, you must:

- Be at least eighteen (18) years of age;
- Have an estate plan prepared or reviewed by the Firm, or otherwise qualify for a Lifebook membership tier;
- Maintain a valid payment method on file; and
- Agree to these Terms and Conditions.

The Firm reserves the right to deny or terminate membership in accordance with this Agreement.

3. MEMBERSHIP TIERS



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Membership pricing is determined based upon the complexity of your estate plan.

Examples include:

Essential Plan

For clients whose estate planning consists primarily of a Last Will and Testament and related basic estate planning documents.

Current Membership Fee: \$7.99 per month – payable yearly

Trust Plan

For clients whose estate plan includes a Revocable Living Trust and related trust-based planning.

Current Membership Fee: \$0.00 - \$750,000 = \$19.99 per month – payable yearly

\$750,000 - \$2.5m = \$39.99 per month – payable yearly

\$2.5m - \$5m = \$69.99 per month – payable yearly

\$5m+ = \$99.99 per month – payable yearly

Advanced Planning Plan

For clients with advanced estate planning structures, business succession planning, tax planning, special needs trusts, irrevocable trusts, or other sophisticated planning arrangements.

Current Membership Fee: Determined at enrollment.

The Firm may modify pricing for future enrollments. Existing Members shall receive at least thirty (30) days' advance notice of any pricing changes affecting their membership.

4. MINIMUM MEMBERSHIP TERM; RENEWAL

Initial Membership Commitment

In consideration of the discounted pricing and ongoing benefits provided through Lifebook, each Member agrees to an initial membership commitment of twelve (12) months (the "Initial Term"), beginning on the date membership is activated.

Membership fees shall be charged yearly during the Initial Term in accordance with the Member's selected membership tier.

Early Cancellation During Initial Term



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A Member may cancel membership at any time by providing written notice to the Firm. However, if cancellation occurs before completion of the Initial Term, the Member shall remain responsible for all remaining membership fees due through the end of the Initial Term, unless otherwise agreed by the Firm in writing.

The Firm may, in its sole discretion, waive or reduce any remaining obligation based upon hardship, incapacity, death, or other extraordinary circumstances.

Automatic Renewal

Upon expiration of the Initial Term, membership shall automatically renew on a yearly basis unless either party provides written notice of cancellation.

Cancellation After Initial Term

Following completion of the Initial Term, the Member may cancel membership at any time. Cancellation shall become effective at the end of the then-current billing cycle. No partial-month refunds shall be issued.

Suspension of Benefits

If a Member fails to make required payments, the Firm may suspend membership benefits, portal access, scheduling privileges, discounts, and other services until the account is brought current.

Reinstatement

A former Member seeking to reinstate membership after cancellation or lapse may be required to:

- (a) satisfy current eligibility requirements;
 - (b) pay any applicable reinstatement fee;
 - (c) enroll at then-current membership rates; and
 - (d) complete an updated estate plan review if requested by the Firm.
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5. MEMBERSHIP BENEFITS

Depending upon the Member's enrollment tier, benefits may include:

A. Estate Planning Portal Access

Members receive access to the Lifebook online portal, which may include:



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- Estate planning document storage;
- Secure access to estate planning documents;
- Document download capabilities;
- Personal information updates;
- Membership management features.

Portal access is provided on an "as available" basis.

B. Annual Estate Plan Review

Members may schedule one annual estate planning review meeting per calendar year.

Reviews are intended to evaluate whether changes in law, finances, family circumstances, or objectives warrant updates to the Member's estate plan.

Unused annual reviews do not roll over.

C. Complimentary Consultations

Members may schedule unlimited consultations of up to twenty (20) minutes each regarding estate planning matters.

The Firm reserves the right to:

- Require advance scheduling;
- Establish reasonable availability limitations;
- Convert matters requiring substantial legal work into billable engagements.

D. Notary Services

Members may receive complimentary notarial services for eligible documents, subject to:

- Florida law;
- Availability of a commissioned notary;
- Verification requirements.

Travel fees and third-party costs may apply.

E. Discounted Legal Services

Members may receive a discount of twenty-five percent (25%) from the Firm's then-current standard hourly rates for covered legal services.



Discounts do not apply to:

- Court costs;
- Filing fees;
- Government fees;
- Expert witness fees;
- Third-party expenses;
- Recording fees;
- Postage;
- Mileage;
- Flat-fee services unless specifically stated.

F. Trust Reviews and Trust Funding Consultations

Members whose plans include trusts may receive:

- Trust funding consultations;
- Trust asset review discussions;
- General trust maintenance guidance.

The Firm does not guarantee that all trust assets have been properly funded or maintained unless separately engaged to perform such services.

G. Property Fraud Monitoring Resources

Members may receive access to property fraud alert resources or assistance with enrollment in publicly available fraud monitoring programs.

The Firm does not guarantee detection or prevention of fraud.

H. On-Call Attorney Access

Members may contact the Firm for estate planning guidance during normal business hours.

Emergency availability is not guaranteed; but all available attorney resources will become available to you as soon as possible.

Response times may vary.

I. Additional Benefits



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The Firm may add, modify, or discontinue membership benefits from time to time provided the overall value of the membership is not materially diminished.

J. IMPORTANT

Membership includes advice and reviews. It does not automatically include unlimited document drafting.

Included at No Additional Charge

The following are generally included during an active membership:

- Annual estate plan review.
- Review of life changes affecting the estate plan.
- Beneficiary review consultations.
- Asset-titling guidance.
- Consultation regarding changes in Florida law.
- Consultation regarding trust funding questions.
- Minor clerical corrections.
- Updating contact information.
- Reissuing previously executed documents from firm archives.

May Be Included Depending on Attorney Review

The Firm may, in its sole discretion, prepare limited updates without additional charge, such as:

- Updating fiduciary contact information.
- Updating successor trustee contact information.
- Correcting scrivener's errors.
- Limited beneficiary adjustments that do not substantially alter the estate plan.

Not Included in Membership

The following generally require a new engagement and additional fees:

- New wills.
- New trusts.
- Trust restatements.



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- Minor/Major trust amendments.
- Adding tax-planning provisions.
- Asset protection planning.
- Medicaid planning.
- Special needs planning.
- Business succession planning.
- Generation-skipping planning.
- Creditor protection planning.
- Multi-state planning.
- Deed preparation.
- Probate representation.
- Trust administration services.
- Court proceedings.
- Litigation matters.

Substantial Change Standard

A change is considered "substantial" when attorney time, drafting complexity, legal analysis, or planning objectives materially exceed the scope of routine membership services.

The Firm shall determine whether a requested modification constitutes a substantial change requiring a separate engagement.

Member Discounts

If a requested update falls outside membership coverage, active Members remain eligible for applicable membership discounts described in the Agreement.

6. SERVICES NOT INCLUDED

Unless specifically agreed in writing, membership does not include:

- Litigation;
- Probate administration;



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- Trust administration;
- Guardianship proceedings;
- Tax return preparation;
- Business representation;
- Real estate closings;
- Court appearances;
- Appeals;
- Asset protection planning;
- Medicaid planning;
- Preparation of new estate planning documents;
- Significant amendments, restatements, or rewrites.

Such services may be available under separate engagement agreements.

7. ATTORNEY-CLIENT RELATIONSHIP

Membership alone does not automatically establish an attorney-client relationship for every matter.

An attorney-client relationship exists only with respect to legal services actually provided by the Firm.

Certain services may require a separate engagement agreement.

The Firm reserves the right to decline representation where conflicts of interest or other ethical obligations prevent representation.

8. DOCUMENT STORAGE AND PORTAL SERVICES

The Firm will use commercially reasonable efforts to maintain secure document storage.

However:

- Electronic systems are not guaranteed to be error-free;
- The Firm cannot guarantee uninterrupted access;



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- Members remain responsible for maintaining their own copies of important documents.

The Firm is not liable for losses caused by internet outages, cyberattacks, force majeure events, or third-party technology failures.

9. MEMBER RESPONSIBILITIES

Members agree to:

- Provide accurate information;
- Keep contact information current;
- Maintain portal login credentials securely;
- Notify the Firm of major life changes;
- Promptly review legal documents provided by the Firm.

Failure to provide accurate information may affect the Firm's ability to provide services.

10. FEES AND PAYMENT

Membership fees are billed yearly using the payment method provided by the Member.

By enrolling, you authorize recurring automatic payments.

If payment is declined:

- Benefits may be suspended;
- Portal access may be restricted;
- Membership may be terminated after notice.

The Firm may use third-party payment processors.

11. CANCELLATION BY MEMBER

You may cancel your membership at any time by providing written notice through the portal, email, or other approved method.

Membership benefits remain available through the end of the paid billing period.

No partial-month refunds will be issued.



12. TERMINATION BY THE FIRM

The Firm may terminate membership for:

- Nonpayment;
- Fraud;
- Misuse of membership benefits;
- Harassment of staff;
- Conflicts of interest;
- Ethical obligations requiring withdrawal;
- Violation of this Agreement.

The Firm may provide written notice of termination.

13. NO GUARANTEE OF LEGAL OUTCOMES

The Firm does not guarantee:

- Any legal result;
- Tax outcome;
- Asset protection outcome;
- Probate avoidance;
- Eligibility for government benefits;
- Prevention of disputes among beneficiaries.

Past results do not guarantee future outcomes.

14. PRIVACY AND CONFIDENTIALITY

The Firm will maintain confidentiality consistent with applicable law and the Rules Regulating The Florida Bar.

The Firm's Privacy Policy, as amended from time to time, is incorporated into this Agreement by reference.



Members consent to electronic communications regarding their membership and legal services.

15. COMMUNICATIONS

Members agree to receive communications by:

- Email;
- Text message;
- Telephone;
- Secure portal messaging.

The Member is responsible for maintaining current contact information.

16. LIMITATION OF LIABILITY

To the fullest extent permitted by Florida law, the Firm shall not be liable for indirect, incidental, special, consequential, or punitive damages arising from membership services, portal access, or related benefits.

Nothing in this Agreement limits liability that cannot legally be limited under Florida law or applicable ethical rules.

17. FORCE MAJEURE

The Firm shall not be responsible for delays or failures caused by events beyond its reasonable control, including:

- Natural disasters;
 - Power outages;
 - Internet failures;
 - Cyber incidents;
 - Government actions;
 - Public emergencies.
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18. CHANGES TO MEMBERSHIP TERMS

The Firm may amend this Agreement from time to time.

Material changes will be communicated to Members.

Continued participation after notice constitutes acceptance of the revised terms.

19. GOVERNING LAW

This Agreement shall be governed by and interpreted under the laws of the State of Florida.

Venue for any dispute shall lie exclusively in the state or federal courts located in Lee County, Florida.

20. ENTIRE AGREEMENT

This Agreement constitutes the entire agreement between the parties regarding Lifebook membership and supersedes all prior discussions and understandings.

21. ACKNOWLEDGMENT

By enrolling in Lifebook, the Member acknowledges that:

1. The Member has read this Agreement;
2. The Member understands the membership benefits and limitations;
3. The Member authorizes recurring yearly payments;
4. The Member agrees to these Terms and Conditions.

MEMBER:

Name: _____

Signature: _____



Sunshine State Law, PLLC

Date: _____

FIRM:

By: _____

Title: _____

Date: _____