



EXHIBIT A

MEMBERSHIP TIER SCHEDULE

The following membership tiers, pricing, and benefits are incorporated into the Lifebook Membership Agreement.

The Firm reserves the right to modify membership tiers and pricing upon written notice to Members.

TIER 1 – ESSENTIAL PLAN

Monthly Membership Fee: \$7.99 – Payable once per year

Designed for clients with:

- Last Will and Testament
- Durable Power of Attorney
- Designation of Health Care Surrogate
- Living Will
- Other basic estate planning documents approved by the Firm

Included Benefits:

- ✓ Secure document storage
 - ✓ Online portal access
 - ✓ Annual estate plan review
 - ✓ Unlimited twenty (20) minute estate planning consultations
 - ✓ Complimentary in-office notary services
 - ✓ Twenty-five percent (25%) discount on hourly legal services
 - ✓ Property fraud alert resources
 - ✓ Attorney access during business hours
 - ✓ Estate planning updates and educational resources
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TIER 2 – TRUST PLAN

Monthly Membership Fee: \$19.99 - \$99.99 – Payable once per year

Designed for clients with:

- Revocable Living Trust
- Pour-Over Will
- Durable Power of Attorney
- Health Care Directives
- Related trust planning documents

Includes all Essential Plan benefits plus:

- ✓ Trust funding consultations
 - ✓ Beneficiary review consultations
 - ✓ Asset titling guidance
 - ✓ Trust maintenance consultations
 - ✓ Periodic trust funding reminders
 - ✓ Additional trust administration guidance resources
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TIER 3 – ADVANCED PLANNING PLAN

Monthly Membership Fee: Determined at enrollment

Designed for clients with:

- Advanced trust planning
- Business succession planning
- Tax-sensitive planning
- Multiple trusts
- Complex family planning structures
- Other advanced estate planning arrangements



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Includes all Trust Plan benefits plus:

- ✓ Priority scheduling
 - ✓ Expanded planning consultations
 - ✓ Periodic planning strategy reviews
 - ✓ Business succession consultations (if applicable)
 - ✓ Advanced beneficiary planning reviews
 - ✓ Additional benefits as determined by the Firm
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OPTIONAL ADD-ON SERVICES

The following services may be offered at additional fees:

- Mobile notary services
- Trust funding assistance
- Deed preparation
- Estate plan amendments
- Trust restatements
- Probate services
- Trust administration services
- Medicaid planning
- Asset protection planning
- Business planning services

Current pricing is available upon request.

MEMBERSHIP BENEFITS SUBJECT TO AVAILABILITY

Certain benefits are subject to scheduling availability, attorney availability, ethical obligations, and applicable law.



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The Firm reserves the right to modify specific benefits provided that the overall value of the membership remains substantially equivalent.



EXHIBIT B

PORTAL TERMS OF USE

1. ACCESS TO PORTAL

Members are provided access to the Lifebook online portal for estate planning document management and related membership services.

Access is personal and non-transferable.

The Firm may suspend or terminate portal access for violations of these Terms.

2. ACCOUNT SECURITY

Members agree to:

- Maintain secure passwords;
- Protect login credentials;
- Restrict unauthorized access;
- Notify the Firm immediately of suspected unauthorized use.

The Member is responsible for activity occurring under the Member's account.

3. ELECTRONIC DOCUMENTS

Documents provided through the portal may include:

- Estate planning documents
- Membership records
- Communications
- Educational materials
- Other legal resources

The Member is responsible for downloading and maintaining copies of important records.

The Firm does not guarantee permanent document availability.



4. NO EMERGENCY COMMUNICATIONS

The portal shall not be used for emergency legal matters.

Submission of information through the portal does not create an obligation for immediate review or response.

5. ACCEPTABLE USE

Members shall not:

- Attempt unauthorized access to systems;
- Upload malicious software;
- Interfere with portal functionality;
- Share login credentials;
- Use the portal for unlawful purposes.

The Firm may immediately suspend accounts for suspected misuse.

6. THIRD-PARTY TECHNOLOGY

The portal may utilize third-party vendors, cloud storage providers, payment processors, and communication services.

The Firm is not responsible for outages, interruptions, or failures caused by third-party providers.

7. NO GUARANTEE OF AVAILABILITY

The Firm does not guarantee uninterrupted portal access.

Maintenance, updates, technical failures, cyber incidents, and force majeure events may temporarily affect availability.

8. DATA SECURITY

The Firm utilizes commercially reasonable security measures.

However, no electronic system can be guaranteed completely secure.



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Members acknowledge the inherent risks associated with electronic communications and online storage.

9. INTELLECTUAL PROPERTY

All portal content, software, graphics, branding, forms, educational materials, and related materials remain the property of the Firm unless otherwise indicated.

Members receive a limited, non-transferable license for personal use.

10. TERMINATION OF ACCESS

Upon termination of membership, the Firm may discontinue portal access after a reasonable transition period.

Members are encouraged to download and retain copies of all important documents before termination.



EXHIBIT C

ELECTRONIC COMMUNICATIONS CONSENT

CONSENT TO ELECTRONIC DELIVERY

The Member consents to receive communications electronically, including:

- Legal notices
- Membership notices
- Billing notices
- Appointment confirmations
- Estate planning reminders
- Newsletters
- Educational materials
- Portal notifications

Electronic communications satisfy any requirement that communications be provided in writing.

METHODS OF COMMUNICATION

The Firm may communicate using:

- Email
 - Secure portal messaging
 - Text messages (SMS)
 - Electronic document delivery systems
 - Other electronic methods authorized by the Member
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MEMBER RESPONSIBILITIES

The Member agrees to:

- Maintain current contact information;
- Monitor designated email accounts;



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- Review communications promptly;
- Notify the Firm of changes to contact information.

Failure to receive communications due to outdated information shall not invalidate communications properly sent by the Firm.

TEXT MESSAGE CONSENT

By providing a mobile telephone number, the Member authorizes the Firm to send:

- Appointment reminders
- Membership notices
- Billing notices
- Estate planning reminders
- Informational communications

Message and data rates may apply.

The Member may opt out of non-essential text communications at any time.

SECURITY OF ELECTRONIC COMMUNICATIONS

The Member understands that:

- Email is not always encrypted;
- Electronic communications may be intercepted;
- Electronic systems carry inherent security risks.

The Member accepts such risks and authorizes electronic communications notwithstanding those risks.

WITHDRAWAL OF CONSENT

The Member may withdraw electronic communications consent by providing written notice to the Firm.

Withdrawal of consent may limit access to certain membership benefits and portal functionality.



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The Firm reserves the right to require alternative communication methods at the Member's expense where legally permissible.

EFFECTIVE DATE

This consent remains effective until revoked in writing by the Member.



EXHIBIT D – ESTATE PLAN UPDATE POLICY

Because this exhibit is especially important, I recommend making it a standalone section in the agreement itself rather than attaching it as a separate page.

Purpose: 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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- 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.

One additional provision I would add for a Florida estate planning practice is a **minimum membership term** (for example, 12 months after plan signing). Otherwise, clients can receive a free annual review, unlimited consultations, document storage, and attorney access, then cancel after one month. Many successful law-firm subscription programs require a 12-month initial commitment followed by month-to-month renewal.