



Estate Plan Navigator Client Disclosure

I/we \_\_\_\_\_ were referred to Estate Plan Navigator

by \_\_\_\_\_

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

- 1.) The attorney assigned to our file is practicing law via the online estate planning software known and disclosed to us as Estate Plan Navigator aka EP Navigator.
2.) If our situation is deemed by the attorney to be too complex, EP Navigator 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 EP Navigator platform/tool or the assigned EP Navigator attorney.
4.) Neither our advisor nor the person(s) assisting us at Estate Plan Navigator 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 EP Navigator 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