# The EPA/FA Referral Relationship Implementation Coaching
# TERMS & CONDITIONS

By signing up for the EPA/FA Referral Relationship Implementation Coaching with The Ultimate Estate Planner, Inc. ("UEP"), you ("Client") agree to the following Terms & Conditions:

## FEES & DURATION

The Implementation Coaching is contracted for a period of twelve(12) months, beginning on or about May 22, 2020. The fee for this Implementation Coaching is $1,495 per month to commence immediately upon signing up and will continue each month for a minimum of the next eleven(11) months. At the conclusion of the 12-month commitment, it will continue forward each month on a month-to-month basis until Client provides a 30-day written notice to cancel.

## TELEPHONE CALLS

The Implementation Coaching services provided under this Agreement are to assist in the implementation process following UEP's Building a Successful Estate Planning Attorney & Financial Advisor Referral Relationship. Philip Kavesh and Kristina Schneider will facilitate these calls between both estate planning attorney and financial advisor. The dates and times of the calls will be arranged in advance directly with UEP and must be scheduled within twelve(12) months from May 22, 2020. All coaching calls are the responsibility of the Client to arrange and attend. Any cancellations within less than 48 hours notice will result in the forfeit of a coaching call. Calls cannot be rolled over into future months beyond the scope of this Agreement and no more than two calls in any given month will be permitted, unless otherwise discussed or arranged. All calls will be held by either telephone or Zoom and will be recorded. An audio recording of each call will be provided to Client once available.

If either the attorney or financial advisor are unable to make a scheduled call, the call can still be conducted without the other and will be charged against the monthly coaching. Ideally, it is preferred both attorney and financial advisor be available and participate on the call. If given 48 hours notice, the call may be rescheduled to another time that is convenient for both attorney and financial advisor to attend; however, keep in mind, calls cannot be rolled into future months beyond the scope of this Agreement and no more than two calls in a given 30-day period may be available.

## COMMUNICATION BETWEEN CALLS

In between Implementation Coaching calls, Client may exchange e-mails and/or schedule interim phone calls with our Practice-Building & Implementation Specialist (Kristina Schneider). This would be to help facilitate and implement any action items, answers to questions, and address any issues that may arise in between scheduled coaching calls.

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