Estately.

ESTATELY + COUNSEL

Estately Attorney Services: A Guide for Advisors

Estately offers two distinct attorney pathways designed to meet different client needs. This guide clarifies the key differences, processes, and when to use each service.

At a Glance: Two Attorney Options

	Attorney Consultations	Estately + Counsel
What it is	30-minute virtual consultation with a T&E attorney	Complete estate plan drafted by an attorney
Attorney provider	Local T&E attorneys in your client's state	Hargrove Firm
Cost	$200 (paid by client to attorney)	Starting at $3,000 (paid by client to Hargrove)
Availability	Select states	All 50 states
Best for	Complex situations, second opinions, specific legal questions	Clients with meaningful net worth, complexity, or specific planning needs

Attorney Consultations ($200)

When to Use This Service

Your client needs legal advice but may not need a full estate plan drafted yet. Ideal for clients seeking a second opinion, exploring complex planning strategies, or getting specific questions answered before moving forward. Please note that this service does NOT include the ability for the attorney to make any changes to the wording of the estate planning documents.

The Process

1. Clients can request an Attorney Consultation through the Estately Client Portal
2. We match your client with a licensed T&E attorney in their state
3. Client pays $200 directly to the attorney
4. Client meets with attorney for 30-minute virtual consultation

Important Notes

- These are independent attorneys in our trusted network, not ASLG attorneys
- Available in select states only: AZ, CA, CO, DC, FL, IN, MD, MI, MN, NC, NE, NJ, NM, NY, OH, OR, PA, SC, TN, TX, UT, VA, WA, WY
- Virtual consultations only

Estately + Counsel: Attorney-Led Estate Planning with Hargrove Firm

When to Use This Service

Your client needs a complete, attorney-led estate plan. This service provides the credibility and peace of mind of attorney-drafted documents and planning with nationwide availability and consistent quality.

Features and Benefits

All estate planning packages include the following:

- Counsel of experienced attorneys and paralegals
- Convenient virtual meetings
- High-tech digital engagement tools
- Intelligent progress management
- Execution support, including online options
- Secure document fulfillment and online storage
- Funding guidance
- Spouse’s plan included at no additional cost
- At-home notarization with a licensed notary and witnesses

Attorney-Led Estate Planning Services and Pricing

Essential Estate Planning Package

The Essential Planning Package includes the counsel of an attorney licensed in your state. This package is designed for simple will-based or trust-based plans with straightforward disposition of assets.

$3,000

- Will or Pour-over Will
- Probate Avoidance Living Trust
- Options for outright distribution to beneficiaries or Descendants' Trust with flexible vesting ages
- General Durable Power of Attorney
- Advanced Care Directive (Living Will)
- Healthcare Surrogate Designation
- HIPAA Authorization

Advanced Planning Package

Clients with more complex planning needs, including a desire to asset protect the legacy they leave their children and grandchildren, will find what they need in the Advanced Planning Package.

$4,000

Everything included in the Essential Package, plus:

- A-B or Disclaimer Trust Planning
- Asset Protection Trusts for children/grandchildren to safeguard inheritance from spouses, creditors, and future estate taxes
- One LLC assignment

Private Wealth Counsel

Private Wealth Counsel is tailored for families with significant wealth who require sophisticated estate and tax planning solutions. This package builds upon the Advanced Planning Package, providing an elevated level of customization and strategy.

Initial fee: $6,000

The initial fee includes:

- All services from the Advanced Planning Package
- The creation of one irrevocable trust
- One additional LLC interest assignment

Many Private Wealth clients benefit from additional planning as their strategy evolves. Common supplemental structures available at an added cost include:

- Spousal Lifetime Access Trusts (SLATs)
- Irrevocable Life Insurance Trusts (ILITs)
- Gifting Trusts/Intentionally Defective Grantor Trusts (IDGT)
- Charitable Trusts
- Special Needs Trusts
- Retirement Asset (Pension/IRA) Trusts
- Beneficiary Defective Inheritor's Trusts (BDITs)

Note: The pricing provided is intended to represent typical cases within the described categories. Actual pricing may vary based on the unique facts and circumstances of each case. Hargrove Firm reserves the right to adjust pricing accordingly.

Who Is Hargrove?

Hargrove Firm is an estate planning law firm providing legal services in all 50 states. With over 100 attorneys, they deliver personalized estate planning for high-net-worth and ultra-high-net-worth clients backed by decades of experience. Its tech-enabled law firm model is trusted by leading wealth advisory firms collectively managing over $400 billion in client assets. Hargrove's online estate planning experience securely connects advisors, attorneys, and clients remotely, with fixed-fee pricing that keeps costs clear and predictable for clients. They offer sophisticated legal advice with a fully integrated digital experience, making estate planning accessible and integrated into the financial advisory process. Hargrove Firm is also SOC 2 Type II compliant, reflecting its commitment to the highest standards of data security.

Learn more at www.hargrovefirm.com.

The Estately + Counsel Process

Getting Started

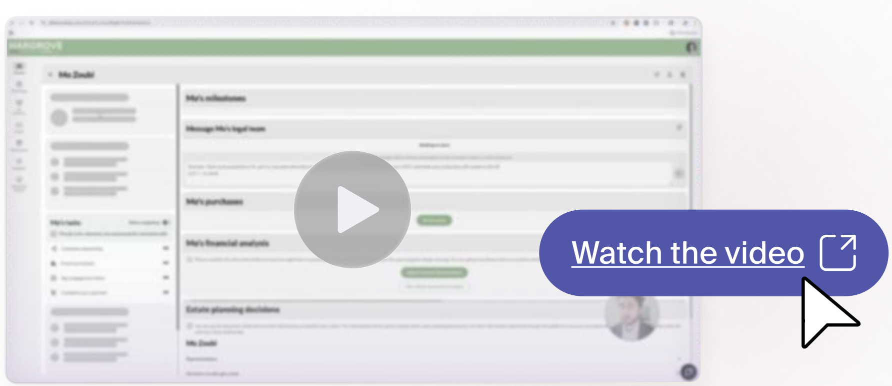
- In the Estately Advisor Portal, click "Request an Attorney" in the left navigation
- Create an account with Hargrove Firm

Hargrove's Planning Milestones

1. Initial Consultation: A complimentary introduction to the legal team and a review of the planning process
2. Plan Design Meeting: Finalize key decisions in preparation for document drafting
3. Wrap-Up Meeting: Review documents with the legal team and prepare for execution
4. Execution and Shipment: The estate plan is shipped to the client and executed using at-home notarization

Platform Demo

Interested in Estately + Counsel? Watch a 5-minute walkthrough of the Hargrove platform:



If you have additional questions about Hargrove, reach out to their Advisor Success team at mzoubi@hargrovemso.com or schedule a live demo.

Common Questions

Q: Why do you use different attorney groups for consultations vs. drafting?

A: Our consultation network consists of independent T&E attorneys who provide advisory services, not document drafting or revising. Hargrove Firm is an estate planning law firm that delivers personalized estate planning for high-net-worth and ultra-high-net-worth clients. Each model serves different client needs.

Q: What differentiates your attorney services from other online estate planning firms?

A: Hargrove Firm is a tech-enabled, attorney-led law firm with over 100 attorneys providing personalized estate planning for high-net-worth and ultra-high-net-worth clients. Unlike DIY or template-based platforms, every plan is drafted and reviewed by a licensed attorney, backed by fixed-fee pricing and SOC 2 Type II data security standards.

Q: Will I be included throughout the Estately + Counsel process and in client communications?

A: Yes. The Hargrove platform makes it easy to stay informed on where your client is in the estate planning process. Both you and your client receive notifications from Hargrove's legal team, and you can communicate directly within the platform to get questions addressed.

Q: Which states are covered?

A: Estately + Counsel is available in all 50 states. Attorney Consultations are available in select states only (AZ, CA, CO, DC, FL, IN, MD, MI, MN, NC, NE, NJ, NM, NY, OH, OR, PA, SC, TN, TX, UT, VA, WA, WY).

Q: Can I select a specific attorney for my engagement with Hargrove Firm?

A: Yes. You're able to select an attorney if you have one you prefer. And if you or your clients have a positive experience with a particular attorney, you're welcome to continue working with that same attorney for future matters.

Next Steps

Ready to request an attorney for your client? Log in to the Estately Advisor Portal and click "Request an Attorney" in the left navigation. Create an account with Hargrove and schedule a demo with their Advisor Success team, access resources, and begin referring clients.