LegalEASE

National Consultation Network Agreement -

Waste Management Plan

Legal Services

Legal Advice and Consultation

Legal Advice Sessions:
Up to Thirty-minute advice sessions with an attorney licensed to practice in the state relevant to your legal matter. The Online Scheduling Tool provides a real-time view of attorney availability for self-service scheduling. Advice sessions can also be scheduled through a Member Specialist by calling the dedicated toll-free number. Services are available during normal business hours. Calls can relate to any personal legal matter, civil or criminal, except those matters that are specifically excluded.

Legal Consultations with Local Plan Attorney:
Up to Thirty-minute consultations by phone or in office when a local attorney is needed. Our dedicated Member Services team can match you with a local attorney for legal matters that require local expertise or likely representation beyond the consultation. Our self-service online Plan Attorney directory is also available. Services are available during normal business hours. Consultation can relate to any personal legal matter, civil or criminal, except those matters that are specifically excluded.

Legal Document Review

Review of Simple Documents (Review up to 10 pages):
The Plan Attorney will review and verbally explain the meaning or impact of any form or document and/or make suggestions for changes to a form or document being drafted. This benefit does not include a written analysis of any form or document. **Documents review of up to 10 pages should be reviewable during the advice session call to be considered simple.**

For longer documents, an additional flat fee is applied:
- 11–15-page documents: $39
- 16–25-page documents: $99
- 26+ page documents: Attorney will contact you to agree on a price (which will include your 25% discount)

Online Document Library

Self-Service Online Documents with Optional Attorney Review:
Self-service online document builder for common legal needs, with **optional** attorney review for documents up to 10 pages.

- **Landlord**: Month-to-Month Rental Agreement, Pet Addendum, Residential Lease, Security Deposit Receipt, Consent to Sublease, Rental Application, and more
- **Consumer**: Request for Refund or Repair of Goods, Automobile Bill of Sale, Promissory Note, Personal Property Rental Agreement, and more
- **Family**: Marital Settlement Agreement, Parenting Plan, Premarital Agreement, Care Agreement (Personal and Elder Care), Notice to Creditors of Death, and more
- **Household**: Housekeeping Services Agreement, Housesitting Agreement, Room Rental Agreement, Construction Agreement, Tenant Request for Repairs Letter, and more

Discounted Legal Services

Legal Representation:
This benefit will cover any legal services to review documents over 10 pages, prepare documents other than those covered in the Estate Planning benefit, or any other service required on any legal matters not listed as a Covered Service or Exclusion in this Plan Description. A 25% discount on Plan Attorney's standard rate applies.
Covered legal matters include:

- **Family Matters**: divorce, child custody/support, name change, adoption, elder law and more
- **Financial Matters**: debt collections, bankruptcy, foreclosure, tax audit, and more
- **Residential Matters**: home sale/purchase, refinancing, landlord/tenant issues, deeds, property tax disputes, and more
- **Miscellaneous Matters**: consumer disputes, lawsuits, lemon law, probate, immigration, and more
- Any additional non-excluded legal matters.

Legal Services Paid by LegalEASE to Network Attorney

Estate Planning

Estate Planning for Two

Estate Planning documents can be created:
- Online using the self-service tool; or
- Online with attorney assistance and/or review; or
- In person with a local attorney

Last Will and Testament_$90 each for Full Preparation
This benefit will cover the creation of a last will and testament. A last will and testament is a legal document that lets you, the testator (the person making the will), designate individuals and/or charities to receive your property and possessions when you pass away. These individuals and charities are commonly referred to as beneficiaries in your last will. A last will also allow you to name a guardian to care for minor children and includes a simple testamentary support trust for the dependent children. The main purpose of a will is to ensure that the testator's wishes, and not the default laws of the state, will be followed upon the testator's death.

or

Living Trust_$360 each for Full Preparation
This benefit will cover the creation of a Living Trust. A Living Trust is a legal document that states who you want to manage and distribute your property if you're unable to do so, and who receives it when you pass away. Once signed, you transfer ownership of your assets into the trust, and you remain in complete control of your property. The trust property can be managed and distributed without going through the probate court. This benefit does not include services related to transactions to fund the trust or transfer assets into it. This benefit does not include tax planning or tax advice.

The Last Will and Testament or Living Trust benefit can be used for one of the following per year:
- One joint Will or Trust for Member and Spouse/Domestic Partner, or
- Individual Wills or Trusts for Member and Spouse/Domestic Partner, or
- One individual or joint Will or Trust for a Covered Family Member.

and

Living Will / Advance or Healthcare Directive_$60 each for Full Preparation
This benefit will cover the creation of a living will or Advance/Healthcare Directive. A living will, commonly referred to as an advance or healthcare directive, is a document that provides instructions regarding end-of-life care, including

whether a person wants life support under certain circumstances. It also helps prevent confusion about the type of care you do or do not want if you can't communicate your wishes. Without a living will, those types of decisions are made without specific guidance from you. Included with a Living Will is a health care power of attorney, which is a document in which you designate someone to be your representative, or agent, in the event you are unable to make or communicate decisions about all aspects of your health care. Without a healthcare power of attorney, your state's laws will determine who will make healthcare decisions for you if you are unable to. This benefit does not include tax planning or tax advice related to the trust or the Member's situation before and after the trust is prepared. This benefit is limited to one use per year per Member and Spouse/Domestic Partner or Covered Family Member.

and

Financial Power(s) of Attorney_$60 each for Full Preparation
This benefit will cover the creation of a power of attorney. A power of attorney (POA) is a legal document that lets you appoint someone to handle financial and legal matters on your behalf. The person authorizing the other to act on their behalf is often referred to as the principal. The person authorized to act is called the agent or attorney-in-fact. With a durable power of attorney, the person you appoint will be legally permitted to take care of important matters for you, including paying your bills and managing your investments, if you are unable to do so for yourself. This benefit is limited to one use per year per Member and Spouse/Domestic Partner or Covered Family Member.

Traffic Tickets

<u>Fully Covered Traffic Matter Legal Services Paid by LegalEASE to Network Attorney:</u>

Traffic Tickets $200 Flat Fee:
Services related to the representation of the Member or Covered Family Member in defense of any traffic ticket except driving under influence or vehicular homicide, including court hearings, negotiation with the prosecutor, trial, and counseling and preparing Member for self-representation at any hearings if chosen. This service is limited to one use per year.

Serious Traffic Matters $500 Flat Fee:
Services related to the representation of a Member or Covered Family Member who is charged by governing authorities with moving traffic violation(s) and conviction could result in suspension or revocation of Member's and/or Covered Family Member's drivers' license. This service is limited to one use per year.

Driving License Protection $300 Flat Fee:
Services related to the representation of a Member or Covered Family Member in an administrative proceeding relating to the suspension or revocation of driving privileges. This service is limited to one use per year.

<u>Appointment Availability and Response Requirements</u>

Network Providers agreeing to this plan will ensure Plan Members have more than one appointment option available when attempting to schedule. Upon receiving an appointment request, Network Provider must respond to accept or decline by the end of business hours on the following business day. In the event a conflict of interest exists between the firm and any party involved in the legal service, please decline the appointment, inform the client that a potential conflict of interest exists, and advise the client to contact LegalEASE for further assistance. Following the consultation, if the Network Provider deems the Plan Member's legal matter to be more complex, requiring additional consultation with a local plan attorney with the necessary specialization or if facts are discovered which could render the legal matter as not covered, the Network Provider should direct the member back to Legal*EASE* for a local referral and/or clarification of coverage. The Network Provider agrees to assist Plan Members in good faith and within reasonable capabilities prior to giving instructions to contact LegalEASE for a further assistance.

ELIGIBILITY

Covered Family Member

- The primary member's spouse or domestic partner
- Dependent children under age 26
- Dependent children incapable of sustaining employment due to mental or physical disability
- Dependent individuals living in the primary member's home (i.e., parents, grandparents)

MEMBER PLAN EXCLUSIONS

Certain matters are excluded from coverage under the Plan. No services, not even a consultation, can be provided on the following matters:

Appellate court proceedings, class actions, interventions, malpractice proceedings, actions in which punitive damages are being sought, derivative actions and amicus curiae filings.

The preparation and filing of individual, partnership, or estate tax returns, appellate or administrative proceedings related to tax returns, litigation before the U.S. Tax Court, U.S. Court of Claims or any other federal, state, or other courts with respect to tax matters.

Matters relating to securities, trademark or patent matters; business or commercial interests, including, but not limited to, professional, partnership and/or corporate matters; matters arising out of a Member/Covered Family Member's role as an officer or director of an organization; matters involving the law or laws of jurisdictions other than the United States and its territories except as specifically described under Covered Services; any matters involving a government (domestic or foreign) entity or agency except as specifically described under Covered Services; farm related issues; matters involving commercial or rental property transactions, including the purchase, sale or lease of investment or income-producing property. A multi-family house, whether or not used by the Member/Covered Family Member as his or her primary residence, is deemed an investment or income-producing property.

Legal services that are fully paid for or provided at no cost by any governmental agency, organization, or insurance company. Matters that the attorney deems frivolous, spurious, harassing, or unethical (collectively referred to as "frivolous") or otherwise prohibited by the Model Rules of Professional Conduct of the state in which the attorney is licensed. Costs associated with covered legal services, including but not limited to, all fines, court costs, penalties, sanctions, expert witness fees, bonds, bail bonds, attorney fees, attorney fees awarded as part of a judgment, exhibits, deposition costs, filing fees, transcripts, postage, telephone, photocopying, recording fees, messengers, judgments, jury fees, court reporter fees, investigative costs, mediator or arbitrator fees, and all other incidental and out-of-pocket legal and litigation costs.

Any services on behalf of a Covered Family Member against the interests of the Member.

Any employment-related matter. This includes, but is not limited to, any dispute involving the Member's employer or its affiliates, their officers or directors, the Member's employee benefit plans, credit unions, programs or arrangements sponsored by an employer, or cases involving workers' compensation, unemployment compensation, sex harassment, age discrimination, etc.

Any dispute or proceeding against the following persons or entities, their officers, directors, employees, or agents: any person or entity involved in the sale, marketing, administration, or other processes related to the group plan; LegalEASE or its subsidiaries; Member's employer; or any Participating and/or Non-Participating Attorney, if the dispute or proceeding pertains to services provided under the group plan.

SPECIAL SITUATIONS

In addition to the coverages and exclusions listed, there are certain rules for special situations. Please read this section carefully.

What if the Member is involved in a legal dispute with Covered Family Members?

In the event that the Member and one of the Covered Family Members are involved as adversaries in a dispute that is a Covered Service, only the Member will be covered. If two or more Covered Family Members are involved as adversaries in a dispute that is otherwise covered, no coverage will be provided.

If two Members are involved as adversaries in a dispute that is a Covered Service, separate coverage for each Member will be provided.

What if a Member is involved in a dispute with another employee?

The Plan excludes any employment related matters as well as any action against Member's Employer. If two Members are involved as adversaries in a dispute that is a Covered Service, separate coverage for each Member will be provided.

PLAN CONFIDENTIALITY & ATTORNEY CLIENT RELATIONSHIP

All attorneys are subject to the authority of the State Supreme Court and the State Bar of the state where they are licensed to practice. The Member's relationship with an attorney is privileged and strictly confidential. We will not interfere in the attorney-client relationship, nor in the attorney's independent exercise of his or her professional judgment. Attorneys are not certified specialists.

The Member shall authorize the Plan Attorney to provide LegalEASE with information and supporting documentation on the number and type of services provided to the Member. Your use of the Plan and the legal services is confidential. LegalEASE will have access only to limited information needed for orderly administration of the Plan.

By using legal services benefits that are provided under the Plan, the Members and Plan Attorneys agree that neither LegalEASE, nor the Employer, nor any other person involved in the marketing or administration of the group plan, shall have any liability for the acts, errors or omissions of an attorney providing services, in whole or in part.

Plan Attorneys may refuse to provide services if they deem the matter to be clearly without merit, frivolous or for the purpose of harassing another person.

Online Appointment Scheduler

BASIC FEATURES:

Online Attorney Profile - Firm Bio, Attorney Bio, Areas of Practice, Website

Contact Information - Location, Hours, Phone, Fax, E-mail, Directions

Attorney Database Selection - Via an online directory your firm will be selected by a plan member. Plan member will then request and schedule an appointment directly with your firm.

Appointment Request & Scheduling - This feature allows plan members seeking legal services to request a consultation appointment online. Your firm will then be able to review your schedule and book the clients appointment without ever having to pick up the phone. Online scheduler manages appointment and staff availability, so clients are scheduled with the right person, at the right location, at the right time.

Platform Calendar and/or Real-Time Calendar Sync – Offers a robust calendar your firm will be able to use as a standalone Calendar. Also, includes real-time integration with Outlook and Google Calendar, Office 365, Riva, Smart Cloud, and any other calendar that supports real time sync though any of those formats so you can continue to use your calendar of choice. Works on mobile, tablet, and desktop.

Reminder Engine – Automated Text Messages, Email and Phone Reminders. Offers a Customer Self-Reschedule Option, Traffic Light Status Indicators and Bi-Directional Confirm/Decline Status

Auto-Add Web Conference
Automatically inserts web conference details into the calendar invitations.

Appointment Completion Notes:
The Company shall provide all administrative services required in connection with the Online Scheduler, including any initial set-up for Network Provider, initial modifications to the Online Scheduler as agreed between the parties hereto, utilization management, management information systems, technological changes and updates, and other administrative functions relating to the Company's Online Scheduler.

Legal Services Paid by LegalEASE to Network Attorney

Payments will be issued for the following legal benefits as outlined on pages 2 and 3 of this agreement:

- **Estate Planning for Two**
- **Traffic Ticket Representation**

There are **NO Claim Forms required** for this plan**. Please submit an itemized invoice with the plan Member's Name & Member ID # to wminvoice@legaleaseplan.com**. Payments will be processed within 15 business days of receipt. To receive payment by ACH as opposed to a mailed paper check, please complete the ACH Payment Form by visiting **http://ach.legaleaseplan.com/**.