

Role of Attorney

BY ACCESSING THIS WEBSITE, YOU AGREE TO BE BOUND BY THE TERMS AND CONDITIONS AS OUTLINED IN THE ROLE OF ATTORNEY. IF YOU DO NOT AGREE TO THE TERMS AND CONDITIONS BELOW, DO NOT ACCESS THIS WEBSITE, OR ANY PAGES THEREOF.

Managing Attorney

EP Cloud's managing attorney is responsible for the design and maintenance of the legal rules that make the EP Cloud platform so "smart." The managing attorney oversees all EP Cloud systems and procedures and is ultimately responsible for everything we do.

Attorney Responsible for EP Cloud Activities in Each State

EP Cloud retains at least one attorney in each state (i.e., jurisdiction). At least once a year, the attorney responsible for EP Cloud activities in your state reviews all document templates and legal rules embedded in EP Cloud to ensure they are up-to-date and accurately reflect the current laws of your state. The attorney responsible for each state receives compensation from EP Cloud for each user who creates an estate plan in their respective state.

Attorney Responsible for Your Use of EP Cloud

EP Cloud automatically assigns an attorney to each user. This may or may not be the same attorney who is responsible for EP Cloud activities in your state. Unless you came directly to EP Cloud from an attorney's website, you do not get to choose the attorney assigned to your file. Outside of routine background checks to ensure the attorney assigned to your file is in good standing with the Bar, EP Cloud does not vet attorneys beyond what the Bar Association in their state requires for them to practice law.

To ensure we always provide the highest quality service, EP Cloud reserves the right to assign a new attorney to your file at any time. You will be notified whenever a new attorney is assigned to your file. If for some reason you do not want to work with the attorney assigned to your file, you can request that your account be closed and all your documents and personal information in your online legal file be transferred to the attorney of your choice.

States Without a Responsible Attorney

You will be notified if, for any reason, there is not an attorney responsible for EP Cloud activities in the state where you reside. While every attempt has been made to assure the documents created by EP Cloud work in every state, without an attorney formally responsible for EP Cloud work in your state, no guarantee can be made that the documents templates and legal rules embedded in EP Cloud accurately reflect the laws of your state.

No Conflicts Check Performed

No conflicts check is performed to ensure that attorneys participating with EP Cloud do not represent someone that may disqualify them from ethically representing you. For example, if the

lawyer responsible for your use of EP Cloud was also representing your former business partner, and you were involved in a lawsuit with your former business partner, it may be unethical for him to represent both you and your former business partner. IF YOU ARE CONCERNED THAT THE ATTORNEY RESPONSIBLE FOR YOUR USE OF EP Cloud MAY HAVE A POTENTIAL CONFLICT OF INTEREST THAT MAY DISQUALIFY THEM FROM REPRESENTING YOU, DO NOT USE EP Cloud.

Limited Access to Attorney

When you use EP Cloud, you rely exclusively on the intelligent system built into EP Cloud to determine, create and use the documents required in your situation. The EP Cloud platform relies on proprietary algorithms to determine the complexity of an individual's situation. If your personal circumstance are too complex for automated production, your file is flagged for a live review. When a live review is triggered, a participating attorney (or an individual designated by and under the direct supervision of that attorney), will contact you to discuss your estate plan and determine appropriate next steps. While every attempt has been made to ensure that the algorithms used to determine when a live review is required cover every possible circumstance, no guarantee can be made that the algorithm will flag every situation that requires a live review. UNLESS A LIVE REVIEW IS TRIGGERED, ALL DOCUMENTS ARE CREATED USING THE PRE-APPROVED AUTOMATED REVIEW PROCESS.

No face-to-face meetings

It is anticipated that you will never meet with the attorney responsible for your file. In fact, the entire system has been designed to limit your access to the attorney, while at the same time, involving the attorney when needed. Unless specific arrangements are made, the only contact you will have with the attorney responsible for your use of EP Cloud will be via telephone or the internet, and only when a live review has been triggered.

Attorney Compensation

Participating attorneys offer their legal services directly to you through the EP Cloud portal. A portion of the fees you pay are legal fees to the attorney assigned to your estate plan. Participating attorneys receive fees that are commensurate to the work that they perform related to each file.

If the participating attorney decides your file is too complicated for automation within the EP Cloud portal, additional fees may apply. The exact amount is determined on a case-by-case basis and paid directly to the attorney. Any amount you paid to EP Cloud will be applied to the quoted fee. You are under no obligation to retain any participating attorney.

Referral Attorney

If EP Cloud triggers a live review, the attorney assigned to your file may or may not be able to provide the services you need. If she cannot provide the services required, then she will provide the necessary professional reference to an attorney who can provide the services you require. Additional assistance beyond the scope of EP Cloud will require a separate agreement with the

attorney and you will be solely responsible for any associated fees. You are under no obligation to use the professionals referred.

Fee Splitting - Compensation Between Attorneys

Fees you pay to any referral attorney are paid directly to the referral attorney. The referral attorney may or may not split the fee they receive from you with the attorney responsible for your EP Cloud file who made the referral. You will be notified by the referral attorney if such a fee split between the attorney's occurs. EP Cloud does not participate in any fee split arrangement between attorneys.

Potential Conflict of Interest

EP Cloud collects fees for services provided using EP Cloud. Any and all payment to EP Cloud is a technology access fee, not a fee for legal services. Even though EP Cloud is not party to the engagement, EP Cloud pays the attorney for their role in providing EP Cloud services. Whenever someone other than the person actually receiving the legal services rendered compensates the attorney, a potential conflict of interest may exist. Every effort has been made to ensure that Estate's Guru compensation to your attorney will not adversely influence the participating attorney's professional judgment, however no guarantee can be made that this payment arrangement will not cause the attorney to favor the interests of EP Cloud over you.

Referral Service

EP Cloud is not registered with any state bar as an attorney referral service.

If you have any questions about the role of the attorney in EP Cloud, contact EP Cloud at +1 (877) 424-0111 or help@myepcloud.com

EP Cloud - Smart Estate Planning Solutions