

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 contracts with an attorney network and licensed technology managed by [Estate Guru](#). Estate Guru and their managing attorney(s) is responsible for the design and maintenance of the legal rules that make up the EP Cloud platform. The managing attorney at Estate Guru 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 contracts with Estate Guru, to retain attorneys in each state (i.e., jurisdiction) that EP Cloud offers services. At least once a year, the attorney responsible for activities in your state should review all document templates and legal rules embedded in the Estate Guru platform 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 their participation with Estate Guru's attorney network.

Attorney Responsible for Your Use of EP Cloud

EP Cloud automatically assigns an Estate Guru network 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. EP Cloud does not vet attorneys beyond what has been done by Estate Guru.

To ensure we always provide the highest quality service, the Estate Guru attorney network reserves the right to assign a new attorney to your file at any time. 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 the Estate Guru platform 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 the Estate Guru platform 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 entirely built and maintained by Estate Guru to determine, create and use the documents required in your situation. The EP Cloud platform relies on licensed Estate Guru technology and algorithms to determine the complexity of an individual's situation. If your personal circumstances 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 ESTATE GURU'S 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 Estate Guru network 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 go to Estate Guru for the legal and technology services rendered within the EP Cloud platform. Participating attorneys in the Estate Guru attorney network 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 the platform 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 the EP Cloud, powered by Estate Guru, Platform. 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 Estate Guru, the attorney network and technology provider, 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 EP Cloud's compensation to your attorney through the Estate Guru attorney network 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 and Estate Guru, contact EP Cloud at help@myepcloud.com

EP Cloud - Smart Estate Planning Solutions