



ANNUAL MAINTENANCE

LIFE POINT LAW

OUR AGREEMENT

One thing you can count on in life is that things will change. At Life Point Law, we strive to provide you with the advice and tools you need along your life's journey. We are grateful to have had the opportunity to start on the road together. With this agreement, we are pleased to continue alongside you.



ANNUAL MAINTENANCE AGREEMENT

We, LIFE POINT LAW (“Firm”), and you, Rohit Yadav (“Client”), enter into this Annual Maintenance Agreement (Agreement) for the services checked below:

1. ☒ **Maintenance Plan Benefits and Fees** The Client and the Firm agree that the services to be provided under this Agreement are those services specifically outlined and priced below.
 - ✓ **Changes to Legal Documents.** Up to one set of minor updates to legal documents created by the Firm each year. (See Section 4.a. for more details.)
 - ✓ **Firm Availability to Client.** The Firm will provide legal estate planning guidance and answers to legal estate planning questions to the Client.
2. ☒ **Optional added Benefits** The Client can elect to have their legal documents available on the Portal by AgingOptions. Here, the client can...
 - ✓ Upload and store information in a structured manner.
 - ✓ Share the information with named agents and family members.
 - ✓ Assign named agents and family members access rights to the account.
 - ✓ Access stored files on-demand on multiple devices.

TERMS AND CONDITIONS

3. **Annual Cost.** The cost each year for the Annual Maintenance Agreement depends on the type of legal estate plan:

☐ **\$ 500*/year for Will-Based Planning**

Will-Based Planning includes a Last Will and Testament document as the primary document of a client's estate plan. Other Will documents such as Pour-Over Wills do not qualify for this category.

☐ **\$ 750*/year for Trust-Based Planning**

Trust-based planning includes a Trust as the primary document of a client's estate plan. Trust documents may take many forms, including, but not limited to, Living Trusts, Revocable Trusts, Irrevocable Trusts, and more. Testamentary trusts, that are part of a Last Will and Testament, are not included in the definition of a Trust-based plan.

☒ **\$ 350*/year for Portal Services only**

Under this pricing, the client will not have free access to Life Point Law.

☒ **The Portal by AgingOptions**

AgingOptions is a law related entity, but distinct from Life Point Law. Your Portal membership gives you the ability to upload, store, manage, and share legal documents and other information related to your retirement plan. If you choose to opt into this benefit, you will no longer be protected by attorney-client privilege as it relates to the information you provide to AgingOptions because AgingOptions is not a law firm.

4. **Description of Services during the Effective Period.** The following services may be provided under this Agreement during the Effective Period, which is one calendar year following each payment made.

- A. **Changes to Legal Documents.** Upon request, the Firm will make up to one (1) set of updates to legal documents the Client has executed with the Firm during the

Effective Period. A set of updates is defined as an unlimited number of updates requested by the Client one time each year. Changes are limited to **minor updates**. Minor updates can be understood as word-processing edits that the Client can explain to a legal assistant without requiring an attorney's expertise. Should the changes exceed this limitation, the Firm retains the right to charge additional fees, after separate and mutual agreement.

The Firm may also, from time to time, contact the Client to recommend updates to documents due to changes in laws, taxes, or best practices.

All meetings must be made in the Firm offices or an online forum. *Out-of-office meetings are specifically not included in this Agreement.* Should an out-of-office meeting become necessary, the Firm retains the right to charge for such time and effort, after a separate and mutual agreement.

- B. Firm availability to Client.** The Firm will remain available during the Effective Period to answer any questions the Client may have about legal planning put in place with the Firm. All reasonable efforts shall be made to work with the Client as expeditiously as possible.
- C. The Portal by AgingOptions.** By signing up for the Portal, the Client is granting AgingOptions permission to access legal documents the Firm has prepared for the Client. The Firm will remain available during the Effective Period to answer any questions the Client may have about Portal access and use. All reasonable efforts shall be made to work with the Client as expeditiously as possible.
- D. Incorporation by Reference.** All other provisions set out in Fee Agreement(s) previously entered into between the Client and the Firm are incorporated herein by reference.

5. **Additional Services:** The Firm will not perform work beyond the identified scope of services detailed herein, nor will it facilitate additional services by third-party providers, without written authorization from Client approving the additional scope and cost and agreeing to make additional payment, if required.
6. **Termination of Agreement.** This Agreement terminates at the end of every Effective Period of this Agreement unless the Client continues payment for the next Effective Period. The Firm may terminate this Agreement under the ethics rules governing Washington lawyers. The Client may terminate this Agreement at any time. Fees paid per this Agreement are **non-refundable**. If the Client terminates the Agreement, the services under this Agreement will continue until the end of that Effective Period.
7. ***Re-Enrollment into Program.** If the Client terminates and then wishes to re-enroll in the Annual Maintenance Agreement, a re-enrollment fee will be charged in addition to this Agreement of \$500 for Will-Based Planning, and \$750 for Trust-Based Planning. The amount will equal the fee that would have been paid to Life Point Law for each year that the payment would have been due had the Client maintained the membership in the Annual Maintenance Agreement.
8. **Non-Legal Services.** *This provision shall not apply if you have opted out of the Portal by AgingOptions.*
 - A. **In addition to its legal services,** the Firm has entered into licensing arrangements with AgingOptions to offer complementary non-legal services. Firm attorney Rajiv Nagaich has a majority ownership interest in AgingOptions. AgingOptions is a planning and education company that is the exclusive owner and licensor of the Intellectual Property rights to LifePlanning and related non-legal services.

B. Consent to Information Sharing between Life Point

Law and AgingOptions. AgingOptions offers access to The Portal by AgingOptions for document storage, including legal documents, as well as instructions set by the Client to users authorized by the Client. By entering into this agreement, and for purposes of facilitating the Client's potential use of The Portal by AgingOptions, you are giving informed consent for the Firm to share confidential information with The Portal by AgingOptions, including but not limited to personal health, housing, financial, and legal information, as well as confidential documents.

9. **IOLTA Account.** In accordance with the Washington State Bar Association (WSBA) requirements, attorneys must maintain a non-interest-bearing account into which the Client may deposit funds to apply to future legal costs. It is also referred to as an "IOLTA" account. The WSBA requires all advance cost deposits such as recording fees to be placed into an IOLTA account. **No fees referenced in this agreement will be deposited into the IOLTA Account.**
10. **Compliance With This Agreement.** In the case where a suit or action is instituted to enforce compliance with any of the terms or conditions of the Agreement or to collect the amounts which may become due under the Agreement, the prevailing party shall be awarded such sum as the court may adjudge reasonable as attorney's fees to be allowed in such suit or actions, including any appeals. Jurisdiction for such suits includes the following: King County, Washington; Pierce County, Washington; or Snohomish County, Washington.
11. **Billing.** Services performed under the Annual Maintenance Agreement are billed annually in advance in keeping with the payment terms agreed to and set out in Exhibit A of this Agreement. ("Recurring Billing Account Pre-Authorization")

12. **Full Agreement.** This document, including Exhibit A (“Recurring Billing Account Pre-Authorization”), constitutes the entire Agreement between the Client and the Firm. Any changes or modifications must be in writing and be signed by both the Client and an attorney in the Firm. The Client and the Firm each acknowledge that they have read and understood the terms of this Agreement and agree to abide by its terms. The Client understands that he and/or she has the right to consult with another lawyer in connection with any of the terms of this Agreement before signing.

Signed on March 26, 2025



SHAGUN SHARMA,
Attorney & Counselor-at-Law LIFE POINT LAW



ROHIT YADAV, Client

Exhibit A

Recurring Billing Account Pre-Authorization

The Client authorizes regularly scheduled charges to his or her Credit Card and/or Bank Account (hereinafter referred to as "Account"). The Client will be charged the amount indicated below each billing period. The charge will appear on the Client's Account statement.


The Client agrees that no prior notification will be provided unless the date or amount changes, in which case the Client will receive notice from the Firm at least ten (10) days before the payment being collected.

I, Rohit Yadav (Client) authorize LIFE POINT LAW to charge my Account referenced below for **\$ 350** on the **03-26-2025** and **\$ 350 annually thereafter**.

I understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify LIFE POINT LAW in writing of any changes in my account information or termination of this authorization at least fifteen (15) days before the next billing date. If the above-noted payment dates fall on a weekend or holiday, I understand that payments may be executed on the next business day. I acknowledge that the origination of Credit Card transactions to my account must comply with the provisions of U.S. law. I certify that I am an authorized user of this Account and will not dispute these scheduled transactions; so long as the transactions correspond to the terms indicated in this authorization form.

Authorized on March 26, 2025

Signature(s):



ROHIT YADAV, Client