



Sample Legacy Leadership Membership Agreement

Continuity & Client Care - Ongoing Support for Eligible Clients

SAMPLE AGREEMENT. This document is a customizable starting point, not legal advice. It does not create a client relationship and should not be signed until every blank is completed and the terms are adapted to the engagement and applicable jurisdiction. Contract and non-refundable-deposit rules vary by state.

Effective date	_____
Client legal name	_____
Client address	_____
Client email / phone	_____

1. Parties and purpose

This Service Agreement is between Legacy-AI Consulting LLC (Provider) and the Client identified above. It states the general terms for the selected service. A signed proposal, statement of work, or addendum may supplement this Agreement; the most recently signed term controls the specific matter it addresses.

2. Scope of services

- Priority monthly client guidance and annual trust-related or business-records review.
- Change and compliance reminder tracking and reasonable professional coordination.
- One administrative information addendum during each continuous twelve-month membership year, within Provider's professional boundaries.

3. Excluded services and professional boundaries

- Amendments to trusts, wills, powers of attorney, deeds, or other legal instruments unless completed by an appropriately licensed professional under a separate engagement.
- Legal, tax, accounting, financial, investment, or insurance advice; government, filing, professional, expedited, or other third-party charges.
- Unlimited revisions, emergency response, or guaranteed availability unless added in writing.

4. Fees, deposit, and payment

The membership fee is \$125 per month and is billed separately from fixed-fee service engagements. No 50% project deposit applies to the membership. The first \$125 monthly payment is due at enrollment before support begins, and \$125 is due monthly thereafter on the _____ day until canceled. Amounts are non-refundable except as required by law or a signed agreement.

Recurring billing requires separate authorization through the payment provider. Failed or reversed payments may pause support. Provider will give advance notice before a fee change applies to a future billing period.

5. Client responsibilities

Client will provide accurate and timely information; review names, addresses, ownership, beneficiary, and other instructions; make all legal, tax, financial, and business decisions; obtain licensed professional advice when appropriate; pay fees when due; and promptly disclose material changes. Government, filing, professional, and third-party charges are separate unless expressly included in writing.



6. Timing, changes, and third parties

Schedules are estimates unless expressly guaranteed in writing. Provider is not responsible for delays caused by Client, government agencies, financial institutions, licensed professionals, technology providers, or other third parties. Material scope changes, additional revisions, and expedited work may require a signed change order, revised timeline, and additional fee.

7. Service-specific terms

Membership begins on _____ and renews monthly until canceled in writing. Cancellation is effective at the end of the paid billing period unless law or a signed term requires otherwise. Membership is limited to eligible Trust or Incorporation clients accepted by Provider. Membership includes one administrative information addendum each continuous membership year. It does not include amendments to a trust, will, power of attorney, deed, or other legal instrument unless completed by an appropriately licensed professional under a separate engagement. The included administrative addendum does not roll over and has no cash value.



8. Confidentiality and information handling

Each party will use reasonable care with nonpublic information. Provider may use contractors and service providers when reasonably necessary and will limit disclosures to the intended purpose. Client should not send passwords, full financial-account credentials, original estate documents, or highly sensitive information through ordinary email unless Provider supplies an appropriate secure method.

9. Cancellation and termination

Either party may terminate by written notice. Client remains responsible for the non-refundable deposit, completed work, approved third-party charges, government fees, and other amounts earned or committed through termination. If applicable law requires a refund or amounts paid exceed the amount properly retained, Provider will return the required excess. Provider may suspend work for nonpayment, missing information, unlawful instructions, abusive conduct, or a conflict with professional boundaries.

10. No guarantee and limitations

Provider does not guarantee a filing, approval, funding, legal, tax, financial, business, asset-protection, or family outcome. To the extent permitted by law, neither party is liable for indirect, special, incidental, exemplary, or consequential damages. This provision does not limit obligations or liability that cannot legally be limited.

11. Governing law and disputes

The parties will first attempt in good faith to resolve a dispute through written notice and an informal conference. Governing state: _____. County or venue: _____. Any mediation, arbitration, court, or attorney-fee requirement must be stated in a signed addendum.

12. General terms

This Agreement and signed attachments are the entire agreement concerning the engagement. Amendments must be in a writing accepted by both parties. If a provision is unenforceable, the remaining terms continue. Electronic records and signatures may be used to the extent permitted by applicable law.

13. Acknowledgment and signatures

By signing, each party states that it has read the Agreement, had the opportunity to ask questions and seek independent advice, and agrees to its terms. No work begins until Provider accepts the signed Agreement and receives the required initial payment.

LEGACY-AI CONSULTING LLC

By: _____

Richard E. Floyd, Jr.

Date: _____

CLIENT

By: _____

Name: _____

Date: _____