

THE ESS *LifeTrack*[®] AGREEMENT

The ESS *LifeTrack*[®] agreement between Estate Settlement Services, Inc. and the client named below.

1. GENERAL PURPOSE

By this agreement, you engage us to provide **ESS *LifeTrack*[®]**, as described below, and we agree to provide these services.

2. SERVICES TO BE PROVIDED

We will provide **ESS *LifeTrack*[®]** encompassing the areas specified below. The plan will be summarized in a written document delivered to you, which will reflect all of your Financial Assets, Debt and Titling including: Real Estate, Bank Accounts, CDs, Insurance, Annuities, Stock/Bond/Mutual Fund Investments, Personal Property, Pensions, Credit Card Companies, Business Interests and location of Safety Deposit Boxes as well as a Key Contact and Action List for your Executor(s), Children and/or Heirs, as provided by you. Per your request we will also store copies of your important Estate Planning Documents, such as Wills, Trusts, Powers of Attorney, Living Wills, Business Agreements, Real Estate Deeds, Insurance and Investment statements.

ESS *LifeTrack*[®]

3. PLANNING WILL FOLLOW THIS PROCESS:

In creating your initial Binder, you and we will follow this process:

- A. Data:** You will provide us with financial and personal data necessary to prepare your binder.
- B. Organization & Storage:** We will organize the data and documents provided and enter into secure storage.
- C. Written Report:** Based on the data you provide, we will prepare and present a personal report summarized in written form. We will send an annual report in order to update your situation and stay current.
- D. Key Contacts:** At your request, Executor(s)/Heirs may receive a Key Contact & Action List for their convenience.

4. COMPENSATION FOR ESS *LifeTrack*[®]

For **ESS *LifeTrack*[®]** services described above, you have agreed to pay the initial fee of \$_____ and \$_____ per month for annual reports, updates, continued storage of important documents and unlimited client service. Your Estate will receive 2 hours free and a 50% discount on our current rate to help settle your estate. Please note: this document also serves as your receipt of payment.

*** By signing below, I agree that I have received and understand the Estate Settlement Services, Inc. Contract Terms and Conditions.

This contract is hereby agreed to and effective _____ (date), at _____ (city/state).

Client Name: _____ Client Signature: _____

Client Name: _____ Client Signature: _____

Street Address: _____

City: _____ State: _____ Zip: _____ Phone: _____

Rep Name: _____ Rep Signature: _____

Method of Payment:

CHECK Check # _____ Check Amount _____

CREDIT CARD
Credit Card Number _____ Exp. Date _____ Amount Paid _____

*MasterCard, Visa, AMEX, & Discover accepted