

Estate Planning Investment Advisory Agreement

Who We Are:

Marian Financial Services, Inc. (MarianFS) is a registered investment adviser based in St. Johns, FL, led by Richard Mark Allison, a CFP® with over 38 years of experience.

What We Do:

We offer estate planning legal documents utilizing Estate Guru. We are not attorneys. Estate Guru has an attorney licensed with the State Bar Association who reviews the legal documents prepared on your behalf.

Marian Financial Services, Inc. and Rick M. Allison help coordinate and input data related to your legal document preparation with Estate Guru and their attorney. We also offer optional Notary services.

Your Role:

- You will complete the Estate Guru Intake Form.
- Keep us updated if your situation changes.

Price for Legal Document Preparation:

Fees:

- See Estate Guru Pricing Guide attached.
- *MarianFS Flat Fees range from: \$250–\$500 depending on services chosen.*
- *Your Total Fee for this engagement: \$ _____*

Services You Get:

- Help with coordinating between Estate Guru and their attorney in the preparation of your legal documents. Financial Powers of Attorney,

