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,

Health Care Powers of Attorney, HIPAA Release and Right to Return are included in the legal documents prepared on your behalf.

Key Things to Know:

- *Marian Financial Services, Inc. or Rick M. Allison is not an attorney and does not prepare legal documents.*

Special Notes:

- You'll get legal documents in a leather binder and also, electronically.
- Estate Guru prices for their services may increase in the future, but are accurate as of the current Estate Guru Pricing Guide.
- Any updates to your legal documents are free the first year, then after that, it is currently $199, but subject to Estate Guru pricing changes, if any.

Your Agreement:

By signing, you confirm you've received this, our Form ADV 2A/2B, and Privacy Policy. You're okay with the Estate Guru Pricing Schedule and our fees and terms.

_____ ____/____/_____
Signed by Date

_____
Printed Name

_____ ____/____/_____
Signed by Date

_____
Printed Name