

Estate Pro 360

Purchase Receipt and Client Disclosures

Purchase Summary and Client Information

Comprehensive Estate Planning Package

\$2,495.00 | One-Time Payment

Client Name: _____

Purchase Date: _____

Address: _____

Email: _____

Financial Advisor: _____

Trust (Single or Dual): _____

Signature Date: _____

Payment & Relationship Disclosure

Your \$2,495 payment is made directly to Estate Pro 360 for the estate-planning package purchased.

Estate Pro 360 is a separate and independent company from the financial professional and financial-services firm that introduced you to this program. This purchase is separate from any investment, insurance, advisory, or other financial product or service offered by your financial professional or their firm.

Estate Pro 360 may use independent third-party providers to supply the estate-planning software and document platform included with your purchase.

Software Access Disclosure

Your estate-planning package includes access to an online estate-planning software platform. Depending on the provider, you may be required to review and electronically accept an applicable license agreement, terms of use, or other access terms before accessing or using the software. The applicable provider's requirements and terms will be presented when software access is arranged.

30-Day Refund Policy

Estate Pro 360 offers a full refund of the \$2,495 purchase price if requested within 30 calendar days of the original purchase date. To request a refund, email admin@estatepro360.com within that period. Include your name and transaction/receipt number.

Refund requests received after the 30-calendar-day period are generally non-refundable, except where otherwise required by applicable law or payment-network rules, or in the event of an incorrect or duplicate charge.

Customer Acknowledgments

This receipt confirms your checkout acknowledgments: you authorized Estate Pro 360 to charge your payment method \$2,495.00 for the estate-planning package; you understood that payment is made directly to Estate Pro 360 and that this purchase is separate from any investment, insurance, advisory, or other financial product or service offered by your financial professional; you reviewed and understood the 30-Day Refund Policy, including your right to request a full refund within 30 calendar days of the original purchase date; and you understood that software access may require review and electronic acceptance of the applicable provider's license agreement, terms of use, or other access terms before accessing or using the software.

Retain the related electronically signed purchase document with this receipt. No additional signature is required on this receipt.

Important Disclosure

Estate Pro 360 is not a law firm and does not provide legal, tax, or investment advice. Your purchase does not create an attorney-client relationship. You should consult an appropriately licensed attorney, tax professional, or other qualified professional regarding questions specific to your circumstances.

Please retain this receipt for your records.