Vanilla Attorney Network : Advisor Overview

WHAT IS THE VANILLA ATTORNEY NETWORK?

The Vanilla Attorney Network is a network of law firms that we offer as a resource to our customers for personalized legal advice and estate plan management. The network covers basic and advanced estate planning services across all 50 states and all wealth levels.

Vanilla's primary network partner is the Will and Trust Center, an independent national law firm established in 1998 with over 100 attorneys and legal professionals specializing in estate planning and ancillary services.

WHAT SERVICES ARE AVAILABLE?

Clients can directly engage network attorneys on a wide range of legal matters, including estate planning (wills, trusts, and related documents), irrevocable trusts, deed preparation, trust funding assistance, LLC creation, trust administration services, and general legal advice.

HOW DOES IT WORK?

① Submit the interest form

The process begins when an advisor or client submits an Attorney Network interest form in Vanilla. The form captures basic contact information, the advisor's details, and a description of the client's legal needs. Advisors can submit on behalf of a client, or clients can submit directly from within the app in the Vanilla Document Builder questionnaire.

If the client has used Vanilla Document Builder, any completed drafts and relevant documents will be shared with the Will and Trust Center as part of the handoff. Documents uploaded by the advisor to Estate Builder can also be provided to the Will and Trust Center.

② Schedule a pre-engagement meeting

The Will and Trust Center will contact the advisor to coordinate next steps within one business day. **Before the client is introduced to an attorney, advisors have the option to meet with a WTC attorney directly — to discuss the client's background, ask questions about the firm's process, and determine how best to move forward.**

If the advisor or client is unsure of the scope of services needed and its related fees, the Will and Trust Center offers a free initial consultation. This is a commitment-free conversation to discuss briefly what the client is looking for and allows the client to get a clear picture of scope and pricing before engaging the law firm.

③ Begin the legal engagement

Once the client is ready to engage the firm, there are three potential paths depending on the client's needs:

- **Full-service estate plan:**
  The client engages the firm to draft or complete a comprehensive estate plan. This may include wills, trusts, powers of attorney, and other documents tailored to the client's situation. The attorney and client work through a structured process over one or more meetings.

- **Attorney review and/or customization of a Vanilla Document Builder plan:**
  If the client has completed a plan through Vanilla Document Builder but wants an attorney to review it, provide feedback, or make customizations, the client can engage an attorney for this specific scope.

- **Timed attorney meeting:**
  If the client has specific legal questions or wants focused advice, they can book a 30- or 60-minute paid attorney meeting. This requires signing an engagement letter with payment in advance.

With client consent, the Will and Trust Center will copy the advisor on all correspondence and welcomes advisor participation in all meetings throughout the engagement.

Understanding the difference: Consultation vs. legal engagement

It's important that advisors understand — and help clients understand — the distinction between the initial consultation and a formal legal engagement.

THE FREE INITIAL CONSULTATION

The initial consultation does not include legal advice or attorney review of documents. Its purpose is to help the client and attorney determine how they would work together and what the scope of the engagement would be.

✓ What it includes	X What it does not include
Discussion of the client's goals and concerns	Legal advice
Review of what legal services may be appropriate	Reviewing or creating legal documents
A clear explanation of scope and pricing for next steps	Estate plan recommendations

No attorney-client relationship is formed during an initial consultation and no legal advice is given.

THE LEGAL ENGAGEMENT

Once a client decides to engage the law firm, they sign an engagement letter and pay a fee directly to the law firm. The attorney will then provide substantive legal services, which may include:

- ○ Specific legal advice tailored to the client's circumstances
- ○ Review of existing estate documents (whether attorney-drafted or created through Vanilla Document Builder)
- ○ Drafting or customizing estate plan documents
- ○ Recommendations for structuring or updating the estate plan
- ○ Funding guidance to help the client retitle accounts and transfer assets into a trust
- ○ Advanced planning (irrevocable trusts, LLCs, special needs provisions, and more)

Pricing varies by service and is structured as either a fixed-fee package for common services or a flat rate for timed attorney meetings. For more complex matters, fees are determined between the attorney and the client based on scope and geography. A current pricing sheet is available on the Vanilla Attorney Network page.

All fees are paid directly by the client — or by the advisor on the client's behalf — to the law firm. Vanilla does not collect fees or perform any legal services.

What to expect after signing the engagement letter

Once engaged, the attorney typically follows a two-meeting process (involving the advisor with client consent):

① First meeting

The attorney discusses the client's goals, gathers information, reviews any existing documents, and provides initial recommendations. After this meeting, the attorney sends a follow-up email with next steps and any client action items.

② Design meeting

The attorney presents the recommended estate plan design, walks the client through key provisions, and confirms final decisions before documents are drafted.

Once documents are executed, the attorney provides funding instructions and closing confirmation to both the client and advisor.

Benefits for advisors

- **Advisor-first introductions**
  New advisors can meet with a Will & Trust Center attorney before their client is ever contacted.
- **Full visibility**
  With client consent, advisors are invited to attend all attorney meetings and are copied on all correspondence throughout the engagement.
- **Consistent support**
  Advisors can usually be paired with the same attorney across their book of business for continuity.
- **Flexible payment**
  Advisors may pay legal fees directly to the law firm on a client's behalf.
- **Client confidentiality**
  The Will and Trust Center is strictly prohibited from sharing client information with any third party, including affiliated RIAs.

FOR MORE INFORMATION

Contact Vanilla Customer Care at help@justvanilla.com with any questions or submit a form here to connect your clients to an attorney from the Will and Trust Center.