

Estate Guru Client Disclosure

I/we			were referred to Estate Guru by		
Вι	ıska	ka Wealth Management			
_	_	gning below I/we acknowledge and understand ing documents from Estate Guru, LLC.	the following regarding the purch	ase of our estate	
1)	The	The attorney assigned to our file is practicing law via the online estate planning software known			
	and disclosed to us as Estate Guru, LLC.				
2)	If our situation is deemed by the attorney to be too complex, Estate Guru, LLC. may not be able to				
	complete our documents using the online platform/tool and the assigned attorney will contact us				
	to discuss the complexities and determine the best way to move forward.				
3)	I/We will be under no obligation to complete our estate planning documents using either the				
	Estate Guru, LLC. platform/tool or the assigned Estate Guru attorney.				
4)	Ne	Neither our advisor nor the person(s) assisting us at Estate Guru, LLC. are attorneys.			
5)	I/We have been encouraged to seek in-person legal counsel if at any time we become				
	uncomfortable with this process.				
6)	Fees paid to Estate Guru, LLC. and/or our financial advisor include but are not limited to the				
	following:				
	a) Payment of the attorney				
	b)	Preparation and shipment of our documents			
	c)	c) Non-legal assistance in navigation of the online interview, entry of our data and answers to the			
		interview questions.			
	d)	d) Non-legal assistance in the funding of our trust if applicable			
	e)	e) Setup, training and ongoing support for use and access to our documents via our online dashboard which contains our estate planning documents.			
7)	The	The definition of "Funding" is: the transferring of ownership of an asset(s) to our trust.			
8)		We understand that the funding and execution of our estate plan is our responsibility.			
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Signature Date			Signature	Date	
Print Name			Print Name		

Advisory services are offered through Buska Wealth Management, LLC, an SEC Investment Advisor. Insurance products and services are offered through Buska Retirement Solutions, Inc., an affiliated company. Tax services are offered through Legacy Tax Solutions, LLC, an affiliated company. Buska Retirement Solutions, Inc. and Buska Wealth Management, LLC do not provide legal advice. Estate planning services offered through Estate Guru. Buska Retirement Solutions, Inc. and Buska Wealth Management, LLC are not affiliated with or endorsed by the Social Security Administration, federal Medicare program, or any other government agency. Call to speak with a licensed agent to discuss your Medicare Health Plan options including Medicare Supplement, Medicare Advantage, and Part D Prescription Drug Plans.