

Client Legal Review Service	Price Per Service (Based on category)	When does this apply?	Process and Access to Third Party Legal Services Provider
None	Included in the fee for a document.	When you are comfortable with the document produced from the Legal Template and do not want any level of legal review, or will obtain your own legal review independently.	<ul style="list-style-type: none"> You enter data into the NowInfinity Platform. Once completed, the NowInfinity platform will generate a document reflecting that data. No legal review, discussion or advice is provided to you.
Category 1			
Data Confirmation	\$137.50 (Inc GST)	<p>When you would like the data you enter into a Legal Template to be reviewed by the legal services provider.</p> <p>This service is not appropriate for documents that are not the establishment of a new entity; e.g. new company, new trust or new superannuation fund.</p>	<ul style="list-style-type: none"> You enter data on the NowInfinity Platform. Once completed, the NowInfinity platform will generate a document reflecting that data (a Generated Document). The legal services provider advises you that they will proceed or that Data Confirmation is not appropriate in their view. The legal services provider reviews the data you have entered to determine if, on the face of the Generated Document and on the basis of that data alone, any legal issues are likely to arise. This review does not confirm the accuracy of the information entered (e.g. no check is made as to the accuracy of corporate details, names, addresses or the like), but does include identification of legal issues that are apparent from the information entered (e.g. if the settlor of a trust is also a named beneficiary). No other legal review, discussion or advice is provided. A legal scope statement is issued confirming the scope of review provided by the legal services provider. The target timeframe for completion of the data confirmation is 1-2 business days.

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Category 2			
Scoped	\$324.50 (Inc GST)	When you would like the document produced from the Legal Template to be reviewed in light of particular concern(s) identified by you.	<ul style="list-style-type: none"> • You enter data on the NowInfinity Platform. Once completed, the NowInfinity platform will generate a document reflecting that data (a Generated Document). • You may submit any specific queries that you may have regarding, or any documents relating to, the Generated Document to be considered by the legal services provider however see the below recommended uses for this level of review • For establishment documents, you may submit a specific query to customise the Generated Documents or a specific query relating to the Generated Documents. OR • For other NowInfinity services e.g. change of trustee or a deed of variation, the legal services provider will review the latest document governing the entity (e.g. the latest Governing Rules, Trust Deed or Constitution) to ensure the correct clause number and the correct parties have been entered to effect the change are parties to the Generated Documents and comply with the relevant provision of the Trust Deed. This review will assume you have entered the details of the parties accurately and that all prior related documents (which the legal service provider will not review) were of legal effect. • The legal services provider will determine whether your queries can be responded to in a scoped review or whether a comprehensive review (or bespoke review) is required. If a comprehensive review or bespoke review is required, the scope review will be cancelled, and you will not be charged for the scoped review. The legal services provider will issue its updated costs estimate separately. • The legal services provider will spend a maximum of 30 minutes conducting the scoped review, which will include a data confirmation (as described above), a response to your queries, and if necessary, any minor amendments to the Generated Document. • No legal review, discussion or advice is provided in relation to any issues other than as raised by you in the specific queries submitted. • A legal scope statement is issued confirming the scope of review provided by the legal services provider. • The target timeframe for completion of the data confirmation is 2-3 business days.

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Category 3			
Comprehensive	\$660 (Inc GST)	When the entire situation of the client needs to be considered.	<ul style="list-style-type: none"> You enter data on the NowInfinity Platform. Once completed, the NowInfinity platform will generate a document reflecting that data (a Generated Document). You may submit any specific queries that you may have regarding, or any documents relating to, the Generated Document to be considered by the legal services provider. If at this stage the legal services provider determines that a bespoke review is required instead (which will be quoted for separately), the comprehensive review will be cancelled and you will not be charged for the comprehensive review. The legal services provider will issue its updated costs estimate separately This will include, if you wish, a telephone conversation or a technology enabled meeting of up to 30 minutes with the legal services provider, designed to explore your queries and your client's particular circumstances. If, after this meeting, the legal services provider determines that a bespoke review is required, the comprehensive review will cease and you will only be charged 50% of the fee for the comprehensive review. The legal services provider will spend a maximum of 60 minutes conducting the comprehensive review, which includes any time spent on the technology enabled meeting referred to above, a data confirmation (as described above), a response to your queries and any other issues identified by the legal services provider, and if necessary any minor amendments to the Generated Document. A legal scope statement is issued confirming the scope of review provided by the legal services provider. The target timeframe for completion of the comprehensive review is 3-4 business days.

Important Disclaimer

- (a) NowInfinity is not a legal, accounting or tax adviser. We are not the author of, and have no editorial control over, any Legal Templates or any information contained in any Legal Templates. The Templates have not been prepared with regard to any of your or your Client's particular circumstances. You must satisfy yourself as to the content and appropriateness of any Templates for your purposes and that of your Clients, and we make no warranty as to the form, content or appropriateness of any Templates for you or your Clients. You and your Clients should obtain your own advice and rely on such advice when using any Templates.
- (b) NowInfinity offers a referral service mechanism (CLIENT LEGAL REVIEW SERVICE) by which you may seek and obtain legal advice from a third party legal services provider in relation to the Services, including any Legal Templates, by way of the provision of a third party legal review as described above. Most third party legal advice sought via this mechanism will be provided by DGF Morgan & Associates Pty Ltd ACN 676 975 796 and subject to its terms and conditions available at <https://www.class.com.au/dgf-morgan-general-terms-of-business-costs-agreement-legal-terms-and-conditions/>. Where legal advice is to be provided by any other third party legal service provider, that legal service provider's terms and conditions will apply and that legal service provider will be responsible for providing you with a copy of their T&Cs at the time of your engagement with them. If you use the CLIENT LEGAL REVIEW SERVICE, to obtain legal advice from a third party legal services provider, NowInfinity may charge and retain a margin on those services provided by that third party. However, you acknowledge and agree that NowInfinity is not legally responsible nor liable whatsoever for the provision of, or the content or appropriateness of, any legal advice made available via this CLIENT LEGAL REVIEW SERVICE referral mechanism which you receive from any third party legal services provider for use by you or your Clients. Please refer to the NI Online T&Cs for further information.
- (c) You acknowledge and agree that the Services and Materials referred to in <https://www.class.com.au/nowinfinity-terms-and-conditions-document/> do not contain or constitute personal or general advice for the purpose of the *Corporations Act 2001 (Cth)* and that NowInfinity, our employees and advisers do not offer any legal, accounting, tax or other professional advice or services in connection with the provision of the Services and Materials.