



LIFE PLANNING PARTNERS

Client Care Agreement

Life Planning Partners, Inc. (LPP) is registered with the State of Florida as a Registered Investment Advisor. Set forth below is the basis upon which LPP will furnish you, the undersigned (Client), LPP's financial planning and investment management services. LPP and Client, hereby agree as follows:

Service

The financial planning process requires a broad based analysis of your financial situation. Based upon current and historical financial information provided by you and interviews to determine your personal goals, attitudes and investment objectives, we will conduct a review for you. The scope of the financial planning and investment advisory services will include a financial plan with recommendations covering investments, risk analysis, estate planning, retirement planning, tax savings suggestions, and budgeting and cash flow analysis. The specific scope of services to be provided can only be determined after a thorough review of the documentation to be provided by you and the completion of the interview process.

Client will be provided with a written analysis and recommended actions in the form of a financial plan. LPP will assist with implementation of Client's plan. However, we will not provide legal advice or tax preparation services. We are happy to work with the Client's attorney or accountant concerning these matters.

LPP will provide continued monitoring of your ongoing financial circumstances and provide continued advice to help you reach the goals that were identified in your financial plan. We will also provide advice concerning changes in these goals or the client's circumstances. Each element of your plan is reviewed at least once a year, including estate plans, tax planning, insurance, cash flow, and goal setting.

LPP will recommend and manage an agreed upon portfolio relative to your risk tolerance and time parameters (Portfolio). LPP will make investment decisions for the Portfolio according to the investment objectives and financial circumstances. The Client agrees promptly to inform LPP if any material changes occur in their circumstances. The Client also agrees to consult with LPP at least annually to provide updated information, if any, about the Client's financial circumstances and investment objectives.

_____ (Initial) For Clients opening a discretionary advisory account, the Client authorizes LPP to buy, sell, or otherwise trade securities or other investments in the Portfolio without discussing the transactions with the Client in advance. The Client also authorizes LPP to take all necessary action to open and maintain the Portfolio and to effect securities transactions for the Portfolio. The Portfolios will be placed with a registered custodian, currently Fidelity, which will serve as the custodian for funds and securities held in the Portfolio. At no time will LPP exercise custody or have access to such assets.

_____ (Initial) For Clients opening a non-discretionary advisory account, the Client appoints LPP as the investment manager to supervise and direct the investments of the Portfolio on a non-discretionary basis. Accordingly, LPP will seek client approval prior to placing orders for any transaction.

Standard of Care

To enable LPP to make the above review, you will furnish us with a copy of such documents or other information as we may reasonably request along with written authorization to contact individuals and institutions which currently provide financial services to you. You will attest you have provided a truthful representation of your current situation and financial activity and agree that LPP will not be liable for any losses, costs, or claims suffered or arising out of your failure to provide us with any required information or documents.

LPP obtains information from a wide variety of publicly available sources and has no sources, and does not claim to have sources, of inside or private information. The recommendations developed by LPP are based upon the professional judgment of Carolyn McClanahan and professional counselors and we cannot guarantee the results of any of their recommendations. You at all times may elect unilaterally to follow or ignore completely or in part any information, recommendation or counsel given by LPP under this Client Care Agreement (Agreement). Any recommendations we make are subject to change due to circumstances beyond our control and we therefore recommend a periodic review no less frequently than annually to assure the accuracy and sufficiency of your financial plan.

Confidential Relationship

All information and recommendations furnished by either party to the other shall, at all times, be treated in the strict confidence in accordance with our Privacy Policy Statement, and shall not be disclosed to third persons except as may be required by law or regulations, or except upon your prior written approval. Client information may be disclosed to other professionals with whom the client may be working with, such as CPAs and attorneys. This Agreement may not be assigned by either party without your prior written consent.

Fees

The fee will be based on client complexity as outlined in our client care schedule and will be renegotiated at the end of every even year (2008, 2010, etc.) The fee for our service will be payable quarterly in advance. This fee will be debited from your Portfolio, as your signature below authorizes this practice, or you may choose to be billed at the beginning of each quarter. LPP does not accept nor receive fees, commissions or other remuneration of any kind from advisors, originators, sponsors, or distributors of investments or products recommended to you. Our only source of income is from you directly.

The total fee for your financial planning services is _____ per quarter, which shall be paid by electronic fee deduction or by check. *[circle preference]*

Services to Other Clients

It is understood that LPP performs investment advisory services for other clients. You agree that LPP may give advice and take action with respect to any of its other clients, which may differ from the advice given or the timing or nature of action taken with respect to your Account, so long as it is LPP policy to the extent practical, to allocate investment opportunities to the Portfolio over a period of time on a fair and equitable basis relative to other clients. It is understood that LPP has no obligation to disclose to you the purchase or sale of any security which LPP, its principals, affiliates, or employees may purchase or sell for its or their own account or for the Portfolios of any other client.

Proxies and Class Action Lawsuits

LPP will not vote proxies and will not be required to take action and/or render any advice with respect to voting of proxies solicited by or with respect to the issuers of securities in which assets of the Portfolio may be invested from time to time. In addition, LPP will not take any action or render any advice with respect to any securities held in the Portfolio, which are named in or subject to class action lawsuits. LPP will forward to Client any information received by LPP regarding class action legal matters involving any security held in the Portfolio.

Electronic Communication

The Client understands that unless subsequent written notice is given, any notice, report or other written communication, including personal financial information may be provided to the Client or its designee(s) by mail, electronic medium including facsimile, e-mail, pdf, etc. Client further acknowledges and accepts the fact that due to the nature of electronic communications in general, there is no guarantee that a message or other electronic communication will reach its destination in a timely manner or that it will reach its destination at all. Further, the Client understands that due to the nature of electronic communication there should be no expectation of privacy in an electronic communication. The Client hereby acknowledges by Clients signature below that it has the ability to receive any such communication via electronic medium (e-mail) and gives LPP expressed consent to receive correspondence in such manner. All notices and other communications contemplated by this Agreement shall be deemed duly given if provided in accordance with this Section.

Termination of Agreement

This Agreement may not be modified or amended except in writing and signed by both Client and LPP. Either party may terminate this Agreement within five (5) days of the date of acceptance without penalty. After the five-day period, this Agreement may be terminated by either party upon thirty (30) days written notice to the other party. LPP shall be paid its fee through the effective date of the termination and any unearned, prepaid fees will be refunded to you.

Assignment of Agreement

No assignment, as that term is defined in the Investment Advisers Act of 1940, as amended (15 USC §80b-1, et seq.), of this Agreement shall be made by LPP without your prior consent.

Governing Law

To the extent that Federal Law does not apply to this Agreement, it shall be construed in accordance with the laws of the State of Florida.

Arbitration

The parties agree that any controversy or claim arising out of or relating to this Agreement, or breach thereof, will be settled by arbitration in accordance with the Commercial Arbitration Rules of the American Arbitration Association then applying. The award of the arbitrators or the majority of them shall be final and binding, and not subject to review or appeal. You understand that this arbitration clause does not constitute a waiver of the right to seek a judicial forum where such waiver is void under federal securities laws.

Acknowledgement of Disclosure Statement

You hereby acknowledge receipt of Part II of Form ADV and LPP Privacy Statement before or at execution of this Agreement. LPP will offer in writing at least annually to provide you with copies of its current Part II of Form ADV. Our Privacy Statement is delivered annually.

This Agreement is understood and agreed to by:

Client Signature _____
Client Printed Name:

Client Signature _____
Client Printed Name:

Life Planning Partners, Inc.

By: Carolyn McClanahan, M.D. CFP®
Its: President

Date: _____ ADV Version Given: _____

www.lifeplanningpartners.com