

Estate⁺⁺ Contingent Bequest Policy effective 07/30/2009

Of all the gifts you can make, a bequest may be the most meaningful. You can remember loved ones in special ways, perpetuate your values, and help shape future generations. A contingent bequest requires a certain event to occur, such as incapacity or death, before property can be distributed. Estate⁺⁺ gives you several ways to distribute your information as a contingent bequest.

- When you create a **shared user**, you can specify that a confirmation email be sent once your death or incapacity has been verified. The confirmation email contains instructions on how to register with Estate⁺⁺ as a shared user. This shared user will not be able to access any information before the email is sent.
- You can create **Notes and Instructions** that can be emailed to selected individuals at death or incapacity.
- You can also specify that a direct link to an **uploaded document** be emailed to selected individuals at death or incapacity. To help safeguard your information, the direct link will expire after 30 days.

Estate⁺⁺ has a manual verification process that must be completed before any information is distributed. Proof of death or incapacity is **mandatory**. Information will not be distributed under any other circumstance. The distribution process is completely automated. At no time will any of our customer service representatives be able to view or alter any of your information.

Proof of death *requires*:

- An authorized certified death certificate (informational copies are not accepted)
- A copy of a picture id of the requestor containing a verifiable mailing address
- The phone number of the requestor
- A notarized *Certificate of Identity* of the requestor (see attached)

Proof of incapacity *requires*:

- A signed physician order stating diagnosis on a prescription form or official letterhead containing a verifiable mailing address and phone number
- A copy of a picture id of the requestor containing a verifiable mailing address
- The phone number of the requestor
- A notarized *Certificate of Identity* of the requestor (see attached)

This may sound like a lot of work, but we feel that your information requires the same trust, care, and privacy as you would expect for any of your other property and valuables. ***Incomplete authorization requests will not be processed.***

Requests can be mailed to:
Vaulting Systems International
4339 Castleton Road
Charlotte, NC 28211

Requests can be faxed to 1.866.594.0089

Certificate of Identity / Sworn Statement

The following identifying information is required to release information owned by

Estate⁺⁺ subscriber _____
(Print Name of Subscriber)

You must be one of the following to authorize release of the subscriber's Estate⁺⁺ information:

- A child, parent, grandparent, grandchild, sibling, spouse, domestic partner, or legal guardian of the subscriber
- An attorney representing the subscriber's estate, or any person or agency empowered by statute or appointed by a court to act on behalf of the subscriber or the subscriber's estate
- The subscriber's attending physician

This certificate must be signed in the presence of a Notary.

| Your Name | Your relationship to the subscriber |
|-----------|-------------------------------------|
| | |
| | |
| | |

I, _____, declare under penalty of perjury
(Print Your Name)
 under the laws of my state of residence, that I am an authorized person, to request release of the subscriber's Estate⁺⁺ information

Subscribed to the _____ day of _____ 20____, at _____, _____
(Day) (Month) (City) (State)

(Signature)

CERTIFICATE OF ACKNOWLEDGEMENT

STATE OF)
) **SS**
COUNTY OF)

On _____, before me _____ personally appeared
(Insert name and title of officer here)

_____, who proved to me on the basis of satisfactory evidence, to be the person whose name is subscribed to the within the instrument and acknowledged to me that he/she executed the same in his/her authorized capacity, and that by his/her signature on the instrument the person, or the entity upon behalf of which the person acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of my state of residence that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.
 (NOTARY SEAL)

 Notary Signature