

## FAQs for Will Builder Subscription Pricing

### ➤ **Why are you changing the pricing model?**

We are committed to providing legal professionals with exceptional software solutions and services to streamline workflows and improve overall efficiency. Our dedication to innovation and customer service motivates us to make continuous improvements to our products and performance.

With a 36-month subscription term, we can guarantee price protection and continue to provide ongoing technical support, training, and maintenance, while delivering new features. The 36-month agreement allows us to keep prices low for our customers and build a product roadmap that solidifies the future success of Will Builder.

### ➤ **What are the benefits of the subscription model?**

The new subscription model will offer many benefits to you including:

- A tiered pricing model based on your previous 12 months' usage
- Unlimited transactions within your tier that provide immediate savings
- Price protection and a monthly fee for the duration of your subscription (36 months)
- All-in-one fee includes ongoing technical support, training, and maintenance updates.

### ➤ **What is the new pricing model?**

All Will Builder customers are moving to the same pricing model. The new pricing model is subscription based, which includes all features, maintenance, support, upgrades and more all in one monthly fee. The price for the subscription is based on the tier you are placed in. Pricing information can be found in your Subscription Order Form.

### ➤ **Where can I find my Subscription Order Form?**

The billing contact will receive the Subscription Order Form via email, which includes the appropriate tier that is customized based on your previous 12 months' usage.

### ➤ **Can I change the tier that I have been placed in?**

We have automatically placed you in a tier based on the transaction volumes and records created and revalidated on your account in the last 12 months. The tier you are placed in has a specified range of transactions, at a set price.

### ➤ **How does the new subscription save me money from the previous pay-per-use model?**

This pricing model continues to offer Canadians the most competitive pricing in the market. When compared to the existing pay-per-use pricing model, customers can now take advantage of the full number of transactions available within their tier to receive savings. Your subscription also includes all program features, support, maintenance, unlimited users, and more at no additional cost.

➤ **If I choose to decline the Subscription, what will happen to my data and access to Will Builder?**

Customers who choose to decline the Subscription will continue to have access to their existing validated records, with no ability to create new records.

➤ **Why is the agreement for 36 months?**

By agreeing to a 36-month term, we can guarantee price protection over your subscription term, saving you money, and provide ongoing technical support, training, and maintenance, while delivering on new features. The agreement allows us to keep prices low for our customers and build a product roadmap that solidifies the future success of Will Builder.

➤ **What improvements to Will Builder are you making within the subscription term?**

Dye & Durham will continue to update Will Builder over the subscription term based on customer feedback and legislative changes. The next scheduled update has changes related to updated Affidavit of Execution and removing in contemplation of marriage.

➤ **Can I cancel my subscription at any time?**

By subscribing to the Subscription, you agree to a 36-month term.

➤ **What day of the month will I be charged for my subscription?**

All charges will be generated on the last day of each month starting January 31, 2022, for the month of February. For customers who pay by credit card, your credit card will be charged on the same day. For customers who use the invoice payment method...

➤ **Why am I getting a notification on January 7<sup>th</sup> and January 31<sup>st</sup>?**

The January 7<sup>th</sup> notification covers the subscription tier for the month of January. The January 31<sup>st</sup> notification covers the month of February. All future invoices will be invoiced on the last day of each month.

➤ **What payment methods do you accept? How do I make a payment?**

As Will Builder transitions to a monthly subscription, we strongly suggest adding a credit card on file for automatic, timely payments. We accept Visa and Mastercard. For customers who use the invoice payment method...

Follow the instructions below to add or change your credit card information:

1. Login as the DEFAULT User.
2. Click on Secure Payment Manager.
3. Select "Add a Credit Card".
4. Enter the card particulars.
5. Click on Register Payment Details.
6. You will receive a message indicating that your credit card has been added successfully, please click Close to this message.

7. Click on “Edit” link beside Product.
8. In the dropdown menu for each program that you subscribe to, select the new Credit Card, and click on Submit.

For customers that have not yet switched over to automatic credit card payments, we will still accept your usual payment method. We do encourage you to contact us at 1.866.367.7648 or [inquires@doprocess.com](mailto:inquires@doprocess.com) to switch over to automatic credit card payments.

➤ **I need more time. Why has there been so little advance notice?**

While we would have liked to provide more time between the announcement and the price adjustment taking affect, there were a number of factors that prevented us from being able to do that.

➤ **Can I export my data?**

No, there is no ability to export data.

➤ **How are transactions calculated?**

Each individual legal will is a single transaction. A reciprocal will is considered two transactions.