

## FAQs for Estate-a-Base 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 Estate-a-Base.

### ➤ **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
- A set price for a range of transactions within your tier for immediate savings
- Price protection and a low monthly fee for the duration of your subscription
- All-in-one fee includes ongoing technical support, training, and maintenance updates.
- Estate Accounting is now included in the tiered pricing
- Add unlimited users or workstations at no extra cost

Additionally, you will continue to have access to:

- Updated court forms
- Notice Connect integration
- Ability to search for a will
- Posted knowledge of will
- Posted notice to creditors

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

All Estate-a-Base 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 validated 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 law firms 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, free estate accounting, and more at no additional cost.

➤ **If I choose to decline the Subscription, what will happen to my data and access to Estate-a-Base?**

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 Estate-a-Base.

➤ **What improvements to Estate-a-Base are you making within the subscription term?**

Dye & Durham will continue to update Estate-a-Base over the subscription term based on customer feedback and legislative changes. Next month, we are launching the new forms that comply with the legislative changes commencing January 1, 2022.

➤ **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.

➤ **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 notifications will be invoiced on the last day of each month.

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

As Estate-a-Base transitions to a monthly subscription, we strongly suggest adding a credit card on file for automatic, timely payments. We accept Visa and Mastercard.

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 (VISA or Mastercard only).
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 payments, we will still accept your usual payment method. We do encourage you to contact us at 1.866.367.7648 or [inquiries@doprocess.com](mailto:inquiries@doprocess.com) to switch over to automatic credit card payments.

➤ **Can I pay annually based on the new pricing model?**

No, all customers will be invoiced monthly. To avoid additional accounting efforts by making multiple payments throughout the year, we strongly suggest signing up for automatic credit card payments. See the question above for more information on how to get started with automatic credit card payment.

➤ **Is there a fee to add additional users/workstations?**

As of December 31, 2021, customers who agree to the Subscription can add additional users/workstations at no additional cost. Please call our Customer Service Team to add additional users/workstations.

➤ **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.

➤ **Will I be able to add additional estate accounting to an existing file if I do not subscribe?**

No. As of December 31, 2021, subscribers will have unlimited estate accounting included as part of the subscription. If you do not subscribe, you will not be able to purchase additional estate accounting as the functionality will no longer exist.