FOR ATTORNEYS, ACCOUNTANTS, ADVISERS, AGENTS, HOSPICES AND FUNERAL HOMES

Give clients a guide with your name on it

When a client is settling an estate, losing a spouse, buying a home or starting a business, give them a code for the Examined Life guide they need. They choose it, download it, and see your firm named as the courtesy provider.

Professional Plan

$499 per year

- 50 single-use client codes, one guide each
- Office reference library: every guide and tool for your staff
- A listing in Find a Professional

Directory listing

$399 per year

- A listing in Find a Professional by state and profession
- 25 single-use client codes
- License confirmed before it appears

Extra codes

$5 each

- $4 each for 100 or more
- Codes expire 12 months after issue
- Print on cards or paste into emails

What your clients see

Provided as a courtesy by **Smith Law**, 123 Main Street, Norman, OK · (405) 555-0100.

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Why firms use it

- Clients can come to meetings organized, with inventories, account lists and timelines already started.
- A useful, low-cost gesture at the moments clients remember, with your name in front of them.
- Your dashboard shows counts only: codes used, downloads by month, titles chosen at least three times. Never client names or emails.
- Invoice, net 30. Nothing renews automatically; we remind you 30 days before your year ends.

The library

Probate and estate planning (with Oklahoma, Texas, Florida and California editions), losing a spouse, funerals, caring for an aging parent, Medicare and Social Security, buying, selling and insuring a home, deeds, landlord and tenant law, a new baby, medical bills, student loans, debt and bankruptcy, small business, investing and more. Many include a companion spreadsheet.

Compliance notes

Give codes to your own clients, not to referral sources. For lawyers, the courtesy line and listing include the firm's name and office address (Okla. R. Prof. Conduct 7.2(c)), and a directory listing is paid advertising (Rule 7.2(b)(1)); we do not recommend or rank anyone. Business gifts are deductible up to $25 per recipient per year (26 U.S.C. § 274(b)(1)), and one code retails at $9.99 to $14.99. Real estate, lending, title and insurance professionals should observe RESPA Section 8 and state inducement limits; hospices, the OIG nominal-value guidance. Your compliance contact has the final word.

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