

# FAIR BILLING POLICY FAQ

On July 31, 2023, Settify announced changes regarding our billing model in the ANZ region. The Fair Billing Policy went into effect on September 1, 2023. If applicable, changes were reflected in the October invoice. The policy will be rolled out to our UK, US and CA clients on 1 December 2023. These changes will be reflected in the January 2024 invoice.

## Why is Settify's billing process changing?

The existing invoicing model requires firms to mark leads as "converted". This is time-consuming, and this process often results in inaccurate accounts. The Fair Billing Policy is fair for all Settify users. It will simplify the invoicing process, save your firm valuable time and ensure a more precise record of the leads provided by Settify.

We recognise that it is time to change how we invoice to continue growing and provide quality products and exceptional service to our most valued commodity - our partner firms. Despite increasing operational costs, Settify has maintained the same pricing model for over seven years. In the background, we have continued to provide value in the following ways:

- The Family Law platform provides lawyers with over 150 data points relating to the client. That's the equivalent of about two billing hours.
- We have established a global Customer Success Team to promptly respond to inquiries and assist our partner firms in maximising the benefits of their investment in Settify.
- We have produced an explanatory video that can be conveniently integrated into your firm's website to assist your clients.
- Additionally, we offer free personalised training, online training webinars, and valuable enhancements to our platform to ensure that Settify delivers on its promise of providing "Brilliant first meetings. Every time."

## How is Settify's billing policy changing?

We are transitioning from a process where firms must manually mark each Settify lead as "converted". This process is time-consuming and often results in inaccurate accounts.

Moving forward, along with a monthly licence fee, all "Billable Leads" provided by Settify will incur a fee (see the table below for more detail). A lead is deemed billable when the client "submits" their information at the end of the Settify questionnaire.

Where a client submits their information before the end of the Settify questionnaire, that lead will be provided free of charge.

**NB:** Settify's standard pricing remains unchanged for the Family and Probate platforms and has decreased for the Wills and Estate Disputes platforms. However, as we have modified the criteria for determining a chargeable lead, this may impact your billing statement.

## Fees

We understand the importance of having comprehensive information to provide the best possible service to your clients. Our partner firms tell us that Settify allows them to engage with clients 24/7, their clients love providing valuable information at a time and place that suits them, and lawyers appreciate the efficiency derived from the brief and client information provided.

Moving forward, all Billable Leads will incur a usage fee. When a client completes the Settify questionnaire, your lawyers have access to highly valued data. This information saves you time and gives you a significant advantage when developing advice for the client.

### Fair Billing Price Structure

## Settify's ANZ Invoicing Structure (From 1 September 2023)

	Family Law	Wills	Probate	Estate Disputes
Monthly Licence Fee	\$99	\$99	\$99	\$99
Billable Leads *	\$99	\$59	\$99	\$99
Free Leads **	\$0	\$0	\$0	\$0

\*Billable Lead: A client who "submits" their information at the end of the Settify questionnaire.

\*\*Free Lead: A client who "submits" their information before the end of the Settify questionnaire.

\*\*\*Amounts above do not include GST. This amount will be added to your monthly invoice.

# Settify's UK Invoicing Structure

(From 1 December 2023)

	Family Law	Wills	Probate
Monthly Licence Fee	£99	£99	£99
Billable Leads *	£99	£59	£99
Free Leads **	£0	£0	£0

\*Billable Lead: A client who "submits" their information at the end of the Settify questionnaire.

\*\*Free Lead: A client who "submits" their information before the end of the Settify questionnaire.

# Settify's CA/US Invoicing Structure

(From 1 December 2023)

	Family Law
Monthly Licence Fee	\$99
Billable Leads *	\$99
Free Leads **	\$0

\*Billable Lead: A client who "submits" their information at the end of the Settify questionnaire.

\*\*Free Lead: A client who "submits" their information before the end of the Settify questionnaire.

\*\*\*CA: Amounts above do not include HST. This amount will be added to your monthly invoice.

## Will this change affect all firms using Settify?

The Settify Fair Billing Policy will apply to all new firms from September 1 in the ANZ region and December 1 for firms in the UK, US and CA. Settify partner firms outside their initial 12-month contract will also transition to the Fair Billing Policy pricing model.

## What is Settify doing to help customers during this change?

We are giving our customers ample time to prepare for the upcoming changes by emailing them about 60 days before the first new "Fair Billing" invoice. We will provide additional notifications through targeted communications. Our Customer Success Team can assist and answer any questions during this transition. For further assistance, please reach out to our team at [support@settify.com](mailto:support@settify.com).

## How will this impact my Settify invoice?

This will be different each month.

While standard pricing has remained the same or, in some instances, decreased, your billing statement may be impacted as the criteria for determining a chargeable lead has been modified.

Your invoice will vary depending on the number of clients that go through the entire Settify questionnaire.

Additionally, lead charges can be disbursed to the client once they become contractually obligated to the firm.

## When will the changes come into effect?

Settify's Fair Billing Policy was enacted in the ANZ region on September 1, 2023. This will take place in the UK, US and CA on 1 December. Settify will continue to invoice monthly in arrears. If applicable, you will see charges for this activity reflected in your invoice the following month.