

# SIGNATUREPLUS MEMBERSHIP

## QUESTIONS AND ANSWERS

### What is the Signature membership?

Signature membership is the same as the membership you currently have. The benefits and price remain the same. It just has a new name allowing us to differentiate it from the new SignaturePLUS membership.

### What is the SignaturePLUS membership?

The SignaturePLUS membership is a new offering launching November 1, 2017.

### How does the SignaturePLUS membership differ from the Signature membership?

The SignaturePLUS membership includes all the benefits you're used to, and adds additional support on legal issues, including direct consultation with legal experts and quarterly legal updates.

### I am a current Exponent Philanthropy member. How will my membership change?

Your membership will only change in name, being called "Signature."

### Why is this new membership offering focused on legal issues?

We have heard from many members that staying compliant is a high priority and that they want more support on the legal front. Liability and staff expertise have limited our ability to provide an elevated level of support, until now. Starting November 1, 2017, we will be working with outside counsel who have agreed to provide members with guidance on their legal questions.

### Do I need to wait until my current membership is up for renewal to sign up for SignaturePLUS?

No, you can upgrade instantly, and we will pro-rate the additional cost depending on how many months you have left in your membership. Your membership renewal date will remain the same.

### What if I don't want to join SignaturePLUS?

You don't need to do anything. Your membership will remain the same—now called "Signature"—and you'll have the option to upgrade at any time.

### How many legal questions can I ask through SignaturePLUS?

There is not a question limit, since many legal situations generate multiple questions. However, there is an annual limit of 10 hours of time spent by our third party legal experts on your requests.

### How quickly will my legal question be answered?

Legal questions that cannot be answered by Exponent Philanthropy staff are forwarded to our contracted lawyers, who will normally respond within three business days. The lawyers may reach out to you sooner based on the volume of questions.

### Are there limitations of the SignaturePLUS membership?

- Lawyers will review documents but will not draft or edit documents.
- The attorneys providing the service are experts in legal issues related to foundations, public charities, and the use of donor advised funds. The service will generally be based on United States federal tax law, as interpreted by the courts and the Internal Revenue Service.
- Lawyers will answer questions based on their general knowledge. If you have questions that require additional research, you will be notified, and the additional hours needed for research will be applied to the 10-hour limit. Depending on the research required, the question may be rejected as beyond the scope of the service agreement.
- The lawyers available through the SignaturePLUS membership will provide you guidance on your situation, but, depending on the complexity of the issue, you may still need to discuss the issue with your own lawyer.

### Can I contract directly with the legal experts available through SignaturePLUS?

Members can certainly seek to contract directly with the lawyers who are fielding SignaturePLUS questions. Please note that their fees would apply and they may not be able to represent you depending on your issue.

### If I'm not a SignaturePLUS member, can I still call your Q&A service for legal questions?

Regardless of your membership type, you can call our Q&A service at any time with any question. If your question can be answered with existing Exponent Philanthropy resources, we will forward those materials and guidance along to you.

If your question is more complex, and you are not a SignaturePLUS member, we will encourage you to discuss your question with your own legal counsel.

**Still have questions?**  
Contact us at 202-580-6560

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