



# LifeSpan Care Consulting

## Client Terms & Conditions and Privacy Policy and Electronic Communications Consent

**Effective Date:** August 8, 2026

**Last Updated:** August 10, 2026

Welcome to **LifeSpan Care Consulting** ("LifeSpan," "we," "us," or "our"). We provide consulting, planning, advocacy support, resource navigation, and related services designed to help individuals and families navigate life transitions, disability-related services, aging, caregiving, education, community resources, and independent living.

These Terms & Conditions explain how our services work, what you can expect from us, and what we expect from you. They also explain how we handle information you provide to us.

By engaging LifeSpan Care Consulting for services, you agree to these Terms & Conditions.

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### 1. Our Services

LifeSpan Care Consulting provides consulting and support services based on each client's individual needs.

Services may include, but are not limited to:

- Individual and family consultations
- Independent living planning
- Life planning and future planning
- Disability and special-needs resource navigation
- Caregiver support and resource navigation
- Education and IEP-related consultation
- Adult disability and aging-related consultation
- Community resource identification
- Benefits and public-assistance resource navigation
- Housing and independent-living resource navigation
- Care coordination support



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- Family meetings and planning sessions
- Referrals to appropriate professionals, agencies, and community resources

The specific services provided to you will depend on the consultation or service package you select.

LifeSpan Care Consulting reserves the right to modify or discontinue services when necessary.

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## 2. Our Role

LifeSpan Care Consulting provides **consulting, planning, education, information, and resource-navigation services.**

Unless specifically stated in a written agreement, LifeSpan is not acting as your:

- Attorney or legal representative
- Medical provider
- Mental-health provider
- Financial advisor
- Insurance agent
- Government benefits administrator
- Licensed social worker or other licensed professional in a capacity requiring a professional license that LifeSpan does not hold

Our services are intended to help clients become better informed and more prepared when making decisions.

We encourage clients to seek advice from appropriately licensed professionals when a matter requires legal, medical, financial, clinical, or other professional advice.



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### **3. No Guarantee of a Specific Outcome**

LifeSpan Care Consulting will make reasonable efforts to provide accurate information, thoughtful guidance, and useful resources.

However, we cannot guarantee that a particular outcome will occur.

For example, we cannot guarantee:

- Approval for government benefits or programs
- Approval for housing
- Eligibility for a particular service
- Acceptance into a program
- A specific IEP or educational outcome
- A particular healthcare or service-provider outcome
- Funding or financial assistance
- Availability of community resources
- A specific timeline for an agency, school, housing provider, insurance company, or government organization to make a decision

Final decisions are made by the appropriate agency, organization, provider, school, government program, or other third party.

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### **4. Client Responsibilities**

Clients play an important role in the consulting process.

You agree to:

- Provide information that is accurate and complete to the best of your knowledge.
- Let us know when information changes.
- Provide documents or information needed to perform the requested services.



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- Review information and recommendations provided to you.
- Make your own decisions regarding your care, services, housing, education, finances, and other personal matters.
- Treat LifeSpan staff and representatives respectfully.
- Meet agreed-upon appointments and deadlines.
- Pay applicable fees according to the agreed-upon payment terms.

You are responsible for reviewing documents submitted to agencies, schools, providers, or other organizations before signing or submitting them.

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### **5. Confidentiality**

LifeSpan Care Consulting understands that clients may share personal and sensitive information during the consulting process.

We will make reasonable efforts to keep client information confidential and to limit access to information to individuals who need it to provide services, operate our business, or comply with applicable legal requirements.

Information may include:

- Names and contact information
- Family information
- Disability-related information
- Educational information
- Housing information
- Financial or benefits-related information
- Caregiving information
- Documents provided by the client
- Information discussed during consultations



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Confidentiality may be limited when disclosure is required or permitted by law, when necessary to protect someone's safety, or when the client has authorized us to share information.

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### **6. Authorization to Share Information**

LifeSpan may need your permission to communicate with third parties on your behalf or as part of providing consulting services.

Examples may include:

- Schools
- Government agencies
- Housing organizations
- Community organizations
- Service providers
- Healthcare or care-related organizations
- Attorneys or other professionals
- Family members or designated representatives

We will generally request your authorization before sharing your information with third parties unless disclosure is otherwise permitted or required by law.

You may withdraw an authorization in writing, subject to legal or contractual limitations.

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### **7. Privacy Policy**

#### **Information We Collect**



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Depending on the services you request, we may collect information such as:

- Your name
- Mailing address
- Email address
- Telephone number
- Emergency or designated contact information
- Information about family members or caregivers
- Disability-related information
- Educational information
- Housing information
- Benefits and public-assistance information
- Documents you voluntarily provide
- Information necessary to understand your goals and service needs
- Payment and billing information
- Communications between you and LifeSpan

We only seek information that is reasonably necessary to provide services, communicate with you, operate our business, or meet legal and administrative requirements.

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### **8. How We Use Your Information**

LifeSpan may use information you provide to:

- Provide requested consulting services
- Develop individualized plans and recommendations
- Communicate with you
- Coordinate requested services
- Identify resources
- Prepare documents or planning materials
- Respond to questions



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- Process payments
- Maintain business records
- Improve our services
- Protect our business and clients
- Comply with applicable laws and legal obligations

We do not sell your personal information as part of our ordinary business operations.

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### **9. Information Security**

We take reasonable administrative, technical, and organizational steps to protect personal information from unauthorized access, use, disclosure, alteration, or destruction.

However, no electronic communication system, website, database, or method of transmitting information can be guaranteed to be completely secure.

For this reason, clients should avoid sending highly sensitive information through unsecured email or other communication methods unless specifically requested by LifeSpan.

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### **10. Third-Party Services**

LifeSpan may use third-party companies or technology platforms to help operate our business.

These services may include:

- Website hosting
- Scheduling



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- Email
- Electronic forms
- Payment processing
- Cloud storage
- Client communication
- Business administration

Third-party providers may have their own privacy policies and terms. LifeSpan is not responsible for the privacy practices of independent third-party websites or services that you choose to use.

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### **11. Website Privacy**

If you visit the LifeSpan Care Consulting website, certain technical information may be collected automatically, such as:

- IP address
- Browser type
- Device information
- General website activity
- Pages visited
- Date and time of access

This information may be used to maintain website security, understand website usage, improve our website, and provide a better user experience.

Our website may also use cookies or similar technologies. You may be able to control cookies through your browser settings.

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### **12. Children's Information**

LifeSpan may provide services involving children, adolescents, or families.





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When services involve a minor, we expect the parent, legal guardian, or other authorized adult to provide appropriate consent and information.

We do not knowingly use children's personal information for purposes unrelated to providing requested services.

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### **13. Client Records**

LifeSpan may maintain records related to services provided to clients.

Records may include consultation notes, forms, correspondence, plans, documents provided by clients, invoices, and other information necessary to document services.

Records will be retained for a reasonable period based on business needs, contractual obligations, and applicable legal requirements.

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### **14. Communications**

By engaging LifeSpan, you may receive communications related to your services, including:

- Appointment reminders
- Follow-up communications
- Service updates
- Requests for information
- Billing communications
- Planning documents
- Other communications related to your engagement with LifeSpan

You may request that certain non-essential communications be discontinued.



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### 15. Fees and Payment

Clients agree to pay the fees associated with the services they select.

Payment terms, deposits, consultation fees, packages, or other charges will be communicated before or at the time services are scheduled.

Unless otherwise stated in writing:

- Payment is due according to the agreed-upon payment terms.
  - Clients are responsible for fees associated with services they have authorized.
  - Third-party fees are the responsibility of the client unless otherwise agreed.
  - LifeSpan may suspend services for unpaid balances.
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### 16. Cancellations and Rescheduling

LifeSpan understands that circumstances change.

Clients are encouraged to provide as much notice as possible when canceling or rescheduling an appointment.

#### **Cancellation Policy:**

LifeSpan requires at least 24 hours' notice for cancellations or rescheduling. Appointments canceled with less notice may be subject to a cancellation fee.

Emergency situations will be considered on a case-by-case basis.

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### **17. Refunds**

Refund policies may vary depending on the service purchased.

#### **Refund Policy:**

Thank you for partnering with **LifeSpan Care Consulting**.

All consulting services, strategy sessions, and advisory retainers are final sale. We do not issue refunds once a service has been booked, initiated, or delivered.

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### **18. Client Materials**

Clients retain ownership of documents and information they provide to LifeSpan.

By providing materials to LifeSpan, you give us permission to use those materials as reasonably necessary to provide the services you have requested.

LifeSpan will not use client materials for unrelated purposes without appropriate permission, except when otherwise permitted or required by law.

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### **19. LifeSpan Materials**

Planning tools, templates, worksheets, guides, educational materials, forms, written recommendations, and other materials created by LifeSpan may be protected by copyright and other intellectual property laws.



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Unless we provide written permission, clients may use materials provided to them for their own personal or organizational purposes but may not:

- Resell them
  - Republish them as their own
  - Distribute them commercially
  - Modify them for commercial resale
  - Claim ownership of LifeSpan materials
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### **20. Third-Party Resources and Referrals**

LifeSpan may identify or recommend outside organizations, professionals, programs, websites, or community resources.

A referral or resource recommendation does not necessarily mean that LifeSpan endorses or guarantees the services, qualifications, performance, availability, or results of that third party.

Clients are responsible for evaluating third-party services and making their own decisions.

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### **21. Limitation of Liability**

To the fullest extent permitted by applicable law, LifeSpan Care Consulting will not be responsible for indirect, incidental, special, consequential, or punitive damages arising from the use of our services.

LifeSpan is not responsible for decisions or actions taken by third parties, including government agencies, schools, healthcare providers, housing providers, insurers, attorneys, financial institutions, or other organizations.



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Nothing in these Terms is intended to exclude liability that cannot legally be excluded under applicable law.

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### **22. Indemnification**

To the extent permitted by law, you agree to hold harmless LifeSpan Care Consulting and its owners, employees, contractors, and representatives from claims, losses, or expenses arising from your misuse of our services, violation of these Terms, or unauthorized use of LifeSpan materials.

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### **23. Termination of Services**

Either the client or LifeSpan may end the consulting relationship.

LifeSpan may suspend or terminate services if:

- A client fails to pay agreed fees
- A client repeatedly misses appointments
- A client provides materially false information
- A client engages in threatening, abusive, discriminatory, or inappropriate conduct
- Continuing the relationship would create a legal, ethical, or safety concern
- Services are no longer appropriate or available

Any outstanding fees for services already provided remain due.

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### **24. Changes to These Terms**



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LifeSpan may update these Terms & Conditions or Privacy Policy from time to time.

The updated version will include a revised "Last Updated" date.

Continued use of our services after an update may constitute acceptance of the revised Terms, to the extent permitted by law.

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### 25. Governing Law

These Terms & Conditions shall be governed by the laws of the **State of Georgia**, without regard to conflict-of-law principles.

Any dispute will be handled in accordance with applicable Georgia law and any applicable agreement between the parties.

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### 26. Severability

If any provision of these Terms is found to be invalid or unenforceable, the remaining provisions will continue to apply to the fullest extent permitted by law.

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### 27. Entire Agreement

These Terms, together with any applicable service agreement, proposal, invoice, consent form, or other written agreement between LifeSpan and the client, represent the understanding between the parties regarding the applicable services.



# **LifeSpan Care Consulting**

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If there is a conflict between these Terms and a separately signed written agreement, the signed agreement will control to the extent of the conflict.

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### **28. Contact LifeSpan Care Consulting**

If you have questions about these Terms & Conditions or our Privacy Policy, please contact:

**LifeSpan Care Consulting**  
Georgia, USA

**Email:** [info@lifespancecareconsulting.com](mailto:info@lifespancecareconsulting.com)  
**Website:** [www.lifespancecareconsulting.com](http://www.lifespancecareconsulting.com)

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### **Client Acknowledgment**

By agreeing with LifeSpan Care Consulting, submitting a service request, or otherwise engaging LifeSpan for services, you acknowledge that:

- You have had an opportunity to review these Terms & Conditions.
- You understand the nature of the services being provided.
- You understand that LifeSpan provides consulting and resource-navigation services and does not replace licensed legal, medical, financial, or other professional services.
- You understand that LifeSpan cannot guarantee a specific outcome from a third-party agency, organization, program, or service.
- You understand how your information may be collected, used, stored, and shared as described in this Privacy Policy.
- You agree to these Terms & Conditions.



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### **Electronic Communications Consent**

**Effective Date:** August 8, 2026

LifeSpan Care Consulting may communicate with clients electronically as part of providing consulting and support services. Electronic communication may make it easier to schedule appointments, exchange documents, provide resources, follow up on action items, and communicate between consultations.

#### **1. Consent to Electronic Communication**

By engaging LifeSpan Care Consulting, you consent to receive communications electronically, including through:

- Email
- Text messages/SMS
- Telephone or internet-based messaging services
- Electronic forms and documents
- Online scheduling systems
- Video conferencing platforms
- Client portals or other secure electronic platforms
- Other electronic communication methods used by LifeSpan Care Consulting

Electronic communications may relate to appointments, services, planning, resources, documents, billing, follow-up, and other matters connected with your relationship with LifeSpan.

#### **2. Sensitive Information**

LifeSpan may receive or communicate information that is personal or sensitive in nature.



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Although we take reasonable steps to protect your information, **ordinary email, text messaging, and other electronic communication methods may not be completely secure.**

You understand and accept the potential privacy risks associated with electronic communication.

You may ask LifeSpan about available secure communication options when sharing sensitive information.

### **3. Client Responsibility**

You are responsible for providing LifeSpan with a current email address and telephone number and for notifying us if your contact information changes.

You are also responsible for maintaining the security of your email account, telephone, device, passwords, and other accounts used to communicate with LifeSpan.

Please notify LifeSpan promptly if you believe your account or communication device has been compromised.

### **4. Text Messaging**

If you provide your mobile telephone number and consent to text communication, LifeSpan may use text messages for appropriate business and service-related communications, such as:

- Appointment reminders
- Scheduling
- Follow-up questions
- Requests for documents or information
- Notifications related to your services



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**Message and data rates may apply depending on your mobile service plan.**

You may request that LifeSpan stop sending non-essential text messages at any time.

Text messaging should not be used for emergencies or situations requiring immediate assistance.

### **5. Email**

Email may be used to communicate about your services, send documents, provide resources, confirm appointments, and respond to questions.

Because email may not be completely secure, clients should use reasonable care when sending highly sensitive information by email.

### **6. Video Conferencing and Virtual Meetings**

If virtual consultations are offered, LifeSpan may use third-party video conferencing platforms.

You understand that virtual communication may involve privacy and security risks associated with internet-based technology.

You are responsible for participating from a reasonably private location when discussing confidential or sensitive information.

### **7. Communication Preferences**

You may request a preferred method of communication.

**Preferred method of communication:**

- ☐ Email
- ☐ Telephone



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- ☐ Text message
- ☐ Client portal
- ☐ Video conference
- ☐ Other: \_\_\_\_\_

You may change your communication preferences by contacting LifeSpan Care Consulting.

### **8. No Emergency Communication**

Electronic communication with LifeSpan is **not an emergency service**.

Do not use email, text messages, online forms, or other electronic communication to report an emergency or situation requiring immediate assistance.

If you are experiencing an emergency, contact the appropriate emergency service or qualified professional.

### **9. Withdrawal of Consent**

You may withdraw your consent to electronic communications at any time by providing written notice to LifeSpan Care Consulting when applicable.

Withdrawing consent may affect our ability to provide certain services efficiently or may require us to communicate through another available method.

Withdrawal of consent does not affect electronic communications that were already sent or any records that LifeSpan is required or permitted to retain.

### **10. Acknowledgment and Consent**

By agreeing, you acknowledge that:



# **LifeSpan Care Consulting**

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- You have read and understand this Electronic Communications Consent.
- You understand that electronic communications may involve privacy and security risks.
- You consent to LifeSpan Care Consulting communicating with you electronically for purposes related to your services.
- You understand that electronic communication is not intended for emergencies.
- You understand that you may request a different communication method or withdraw your consent.