

In the Supreme Court of the State of Utah

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In re: Application of Trajan Estate LLC

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AMENDED ORDER FOR AUTHORIZATION TO PRACTICE LAW

*Based upon the Utah Supreme Court's plenary and constitutionally granted authority to regulate the practice of law in Utah, and the tenets of Standing Order 15, the Utah Supreme Court orders that Trajan Estate LLC ("Trajan Estate") is authorized to practice law within the regulatory sandbox and subject to the restrictions outlined below.*

The Court has reviewed the recommendation of the Office of Legal Services Innovation ("Innovation Office") dated April 6, 2022 and amended recommendation, dated September 14, 2022, for Trajan Estate to be authorized to practice law.

Trajan Estate provides estate planning legal services and ancillary business legal services. As an ABS, the Sandbox provides the opportunity for Trajan Estate to partner with non-lawyers, specifically Trajan Wealth, to provide cost effective wrap-around services for consumers.

The Innovation Office has assessed the risk of harm to Trajan Estate's targeted consumers relative to the risk of harm they currently face and has determined that the risk of harm presented by Trajan Estate's service is Low.

In light of the Court's responsibility to the public to effectively regulate the practice of law in Utah and in keeping with the tenets of Standing Order 15, the Court now orders as follows:

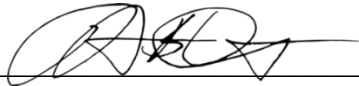
1. Trajan Estate is authorized to offer legal services as an ABS through the following models:
  - a. Lawyer employed or managed by a nonlawyer

- b. Lawyers sharing profits with nonlawyers
  - c. Nonlawyer ownership
- 2. Trajan Estate is authorized to provide legal services across the following legal service areas, subject to the restrictions outlined below:
  - a. Estate planning
  - b. Business
- 3. Trajan Estate shall conform to the Low Innovation reporting requirements imposed by the Innovation Office.
- 4. Trajan Estate will prominently display the following disclosure requirements:
  - a. Innovation Office Badge
  - b. Nonlawyer ownership disclosure

If Trajan Estate wishes to alter these conditions or requirements, it must submit any such change to the Innovation Office for further assessment. The Innovation Office will assess the proposed change and may permit the change if it deems the change does not materially increase the risks to consumers. If the Innovation Office finds a material increase in risk, then it will present the issue to the Court for further consideration.

This authorization is granted for the duration of the existence of the Sandbox, or until exit and permanent licensure at the discretion of the Court. Authorization is subject to Trajan Estate's compliance with the conditions and requirements set forth in the Innovation Office Manual and the Innovation Office Recommendation to the Court and to a verification by the Innovation Office that the company's services are not causing material harm to consumers.

DATED this 21st day of September, 2022.

  
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Matthew B. Durrant  
Chief Justice