KEPT COVENANT LEGACY SOLUTIONS LLC

KCLS CONCIERGE SERVICES

A Little Help. A Lot of Heart.

COMPLETE CLIENT SERVICE GUIDE

CLIENT DOCUMENT • CONTROLLED COPY

Current package and scheduling edition - October 23, 2026.

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SAFEGUARDING UPDATE | October 31, 2026

Section 7.9: Safety and Abuse Reporting - page 17.

Read with Sections 7, 8 and 10. Existing service terms remain in effect.

1 | A Personal Welcome from Our Founder

Hello, and welcome! I am so glad you chose KCLS as your trusted partner so you do not have to navigate everyday responsibility alone.

My name is Barrium Clinton, Founder and Chief Executive Officer of Kept Covenant Legacy Solutions LLC. First and foremost, I am a Certified Nursing Assistant. My journey also includes medical administrative education and training, a Bachelor of Science in Business Administration focused on Healthcare Management, and ongoing MBA studies in Healthcare Management, with anticipated completion in October 2027.

My journey in healthcare began on the front lines. I have had the privilege of supporting people through vulnerable moments, learning from their stories, and developing skills that I will carry into the growth of KCLS. Some of my greatest lessons came not from a classroom, but from everyday interactions, difficult situations, and the trust people placed in me.

I established KCLS not to become just another business connected to healthcare, but to give back to a field that poured so much into me before I fully recognized it. I want to build an organization rooted in compassion, purpose, and legacy—where people feel valued, seen, heard, and respected.

And when I say people, I mean our team members as well as our clients. I believe that those providing assistance deserve the same dignity, patience, respect, and grace that we expect them to extend to others. Compassion should never be a one-way expectation. That belief will shape the culture of KCLS as we grow.

KCLS Concierge Services is designed to provide nonmedical household and lifestyle assistance—not nursing, hands-on personal care, or protective supervision. Our goal is to support the life you have already built, not take away your independence or make decisions for you. We will be warm in our approach and firm about the professional boundaries that keep everyone safe.

I know that inviting someone into your home or personal routine requires trust. We do not take that trust lightly. Whether we are organizing a space, preparing a simple meal, helping with technology, or sharing a conversation, I want you to feel listened to and treated with genuine intention.

Although KCLS is a business and our services are provided for a fee, I hope you find more than a transaction. I hope you find a sense of home in the experience—one where your independence, preferences, and voice always matter.

Thank you for becoming part of our story. I look forward to the relationships we will build and the legacy we will establish together.

With all my love, from yours truly,

CEO Clinton

Founder & Chief Executive Officer • Kept Covenant Legacy Solutions LLC

SECTION 2 | GETTING STARTED WITH KCLS

Welcome to a Simpler Way of Getting Things Done. We understand that welcoming someone into your home or personal routine is a meaningful decision. Our goal is to make getting started comfortable, transparent, and straightforward.

2.1 Your Initial Inquiry

KCLS reviews your website inquiry and emails the intake form. Complete and return it to the business email. The owner reviews your information and arranges a telephone consultation before the home consultation.

2.2 Your Complimentary Telephone Screening

Before accepting a new client, KCLS conducts a complimentary telephone screening lasting approximately 15–20 minutes. We learn about your needs, explain services, answer questions, and determine whether nonmedical concierge assistance is appropriate. We discuss boundaries including hands-on personal care, medical assistance, protective supervision, and client transportation. This required new-client screening is not a medical assessment.

2.3 Home Consultation and Paper Enrollment

KCLS arranges a home consultation to review needs and complete the consultation form. If both parties proceed, complete enrollment and agreements in two matching paper sets. Existing consultation fee, distance and availability rules apply; any fee is disclosed in advance. No medical evaluation or hands-on care is included.

2.4 Creating Your Service Plan

We work with you to identify concierge tasks KCLS can appropriately provide, including approved household activities, lifestyle assistance, preferred times, duration, and travel considerations. The plan respects your independence, preferences, and budget. Requests remain subject to approval, safety, availability, and nonmedical scope.

2.5 Reviewing Your Client Agreement

Before service is confirmed, review the Agreement and Client Service Guide. Complete, sign and date two matching sets of documents requiring signatures: one stays with you and one with KCLS. Receive informational guides without duplicate signatures. No portal or signing app is required. Material contractual changes require updated consent.

2.6 Scheduling Your First Appointment

Appointments should ordinarily be requested at least 48 hours in advance and may be requested up to 60 days ahead.

After enrollment, contact KCLS to agree on visits. KCLS enters appointments and sends Square invoices by text or confirmed email. Tasks, location and charges are confirmed before service.

payment. An inquiry or proposed time does not guarantee a reservation. An appointment is confirmed only after KCLS approves the booking and required electronic payment is successfully authorized.

2.7 Preparing for Your First Visit

Identify tasks to prioritize and make necessary supplies available. For in-home services, you or a previously written-authorized adult age 18 or older must provide entry and remain on premises throughout. KCLS does not accept keys, independent access codes, or entry to an unattended home. We review planned tasks and questions at the beginning of the visit.

2.8 After Your Appointment

We maintain internal records of assistance, service times, tasks, and relevant updates. You receive a completion summary according to your service arrangement. We welcome questions, corrections, and feedback.

2.9 Supporting Different Household Needs

KCLS welcomes independent older adults, other independent adults, and families seeking practical household or lifestyle assistance. Parents or caregivers of children with disabilities may receive approved household tasks, errands, organization, or scheduling assistance. KCLS does not assume childcare, direct care, or supervision of children; a responsible adult retains those responsibilities.

2.10 A Thoughtful Beginning

Every household is different. From the first inquiry to the first completed appointment, we aim to provide professionalism, patience, respect, and genuine care. You are beginning a relationship built on communication, trust, and making everyday life a little easier.

SECTION 3 | OUR CONCIERGE SERVICES

Thoughtful Assistance for Everyday Living. Our purpose is to make everyday life easier while supporting independence and respecting client decisions. All activities remain within our approved nonmedical scope.

3.1 Social Companionship & Meaningful Engagement

Friendly conversation, active listening, reading together, games, puzzles, hobbies, leisure activities, and approved social or appointment accompaniment without providing transportation. These services are social enrichment, not mental health treatment, protective supervision, dementia monitoring, or personal care.

3.2 Light Housekeeping & Household Organization

Routine accessible dusting, counters, dishes, sweeping, mopping, vacuuming, tidying, organizing closets and drawers, making unoccupied beds, changing ordinary linens, and carrying ordinary bagged trash to an accessible bin. Clients provide cleaning supplies and equipment. No deep cleaning, heavy furniture, ladders, pests, hazardous waste, or specialized sanitation. Obtain express permission before moving, discarding, donating, or removing belongings.

3.3 Laundry & Linen Assistance

Routine wash, dry, fold, put away, and sorting using client equipment and supplies. Off-site laundromat tasks may be approved during package visits only within five driving miles of the client home; the client pays laundromat charges directly or through a prepaid arrangement with the laundromat, and items must be returned within the appointment including approved prepaid extension. Insurance approval is required for handling and transporting client property. No contaminated laundry, biohazards, or occupied-bed assistance.

3.4 Meal Preparation & Kitchen Assistance

Simple meals and multi-day meal preparation take place only in the client's home during approved package visits using client-provided food and equipment. Tasks include preparing ingredients, labeling meals with preparation dates, prompt refrigeration, and routine kitchen cleanup. Clients disclose known allergies and preferences; an allergen-free environment cannot be guaranteed. Obtain permission before discarding spoiled food. No feeding, medical dietary treatment, catering, or commercial food delivery.

3.5 Grocery Shopping & Nonmedical Errands

During package visits only: prepaid groceries and household goods pickup, gifts, returns/exchanges, ordinary package pickup/drop-off, prepaid shipping, and gift wrapping with client materials. No standalone errands. Client or authorized payer pays retailers directly; KCLS does not accept shopping cash, cards, transferred funds, or advance company money. Client approves substitutions through retailer. Refunds go directly to the client or original payment method. No hazardous, restricted, illegal, or unusually valuable packages; no client transportation. Errand time counts within the appointment and mileage rules apply.

3.6 Senior Technology Assistance

Patient guidance with phones, tablets, computers, video calls, email, device settings, online navigation, and appointment websites. Clients remain responsible for accounts, passwords, financial decisions, and private information. No banking management, professional device repair, cybersecurity guarantees, or legally significant decisions on behalf of clients.

3.7 Lifestyle Coordination & Appointment Scheduling

Nonmedical appointment scheduling or confirmation at client direction, calendars, reminders, approved household appointments, checklists, personal schedules, routine correspondence, and coordination of errands. KCLS may accompany clients where separately approved but does not transport them, manage medical cases, interpret clinical instructions, or make healthcare decisions.

3.8 Family Communication & Nonclinical Updates

With appropriate written client authorization, KCLS may share factual nonclinical appointment completion, task, scheduling, and service-related updates with designated recipients. Paying for services does not automatically grant access. Scheduling, payment, information, emergency, and legal authority are distinct roles. No diagnoses, clinical assessments, or treatment recommendations.

3.9 Minor Outdoor & Household Assistance

Low-risk accessible porch sweeping, plant watering, manageable trash-bin movement, and light organization of accessible outdoor items. No ladders, heavy lifting, landscaping, specialized equipment, or hazardous conditions. Severe heat, storms, flooding, and poor air quality may require modification, postponement, indoor alternatives, or fair cancellation.

3.10 Incidental Pet Assistance

When safe and approved, incidental feeding/water, light feeding-area cleanup, ordinary litter boxes, routine outdoor dog waste, and minor manageable pet messes using protective supplies. Pet waste cleanup is owner-operated at launch only after insurance and safety procedures are confirmed. Future staff may opt in voluntarily with approval, training, and PPE; it is never mandatory. No walking, sitting, grooming, animal medication, veterinary transport, or extensive contamination. Unsafe animals must be secured; service animals are accommodated as required by law.

3.11 Understanding Our Service Boundaries

KCLS is not a licensed home health agency, personal assistance provider, medical transportation company, or emergency responder under its concierge offering. Excluded: bathing, dressing, toileting, feeding, lifting, transfers, repositioning, medication administration or management, nursing, clinical monitoring, protective supervision, child care or supervision, client transportation, managing client money/cards/accounts, or tasks requiring licensure or unsafe exertion.

3.12 Assistance With Purpose

Independence should be respected, not replaced. Whether preparing a meal, organizing a space, completing an errand, or sharing conversation, we serve with compassion, work with purpose, and build a legacy of genuine care.

SECTION 4 | SERVICE OPTIONS, PRICING & SERVICE AREAS

Quality Assistance. Transparent Pricing. Every charge is disclosed before an appointment is confirmed.

4.1 Essential, Enhanced & Extended Concierge Visits

Essential Concierge Visits: 4 reserved hours for $132. Enhanced Concierge Visits: 6 reserved hours for $198. Extended Concierge Visits: 8 reserved hours for $264. Eligible approved tasks may be combined flexibly within each reserved visit. The selected package reserves the full visit duration; no individual-service prices or short-visit service are offered. All three packages equal $33 per reserved service hour. Approved combinations include companionship, housekeeping, laundry, simple meals, errands, coordination, technology, authorized updates, and approved incidental household/pet tasks. Errand travel and waiting use reserved time; mileage rules remain separate. Launch remains subject to legal, insurance and operating-cost review.

4.2 Package-Only Service Selection

Clients select eligible tasks within a reserved package. There are no separately priced individual services or short-visit service offerings. Existing exclusions and task-specific approvals remain in force.

4.3 Recurring Weekly & Monthly Visits

One-time visits and weekly or monthly recurring arrangements are available. The agreed recurring schedule continues until canceled, subject to availability, existing appointment cancellation rules, advance payment, and approved scope. Record the package, actual dates or weekday/time pattern, reserved start/end times, and payment period in the service plan or Recurring Visit Schedule Confirmation. Confirm appointments within the existing 60-day booking horizon; continuation does not guarantee indefinite availability. Total each payment period from its actual reserved visits. Each visit uses its selected package price, with no automatic recurring discount or surcharge for choosing weekly instead of monthly payment.

4.4 Our Standard Concierge Service Area

Within 10 driving miles of the designated operating location there is no extended-commute fee. Beyond 10 miles, approved appointments incur $0.85 for each additional round-trip mile beyond the 10-mile one-way radius. Example: 15 miles away means five additional one-way miles, ten additional round-trip miles, or $8.50. Commute mileage and errand mileage are separate.

4.5 Errand Mileage for Standard Concierge

The first 10 business-related errand miles driven during a package visit are included. Approved miles beyond 10 cost $0.85 per mile. Example: 22 errand miles means 12 additional miles, or $10.20. Approved, disclosed tolls and parking are reimbursable. Materially expanded travel requires prior approval. Errand mileage and KCLS commute mileage are calculated separately.

4.6 Scheduling the Full Reserved Visit

One provider; no overlaps. Keep a one-hour Square buffer plus needed travel. Full visits must fit approved hours. Latest starts: Mon - Essential 2 p.m., Enhanced noon, Extended 10 a.m.; Tue-Fri - Essential 4 p.m., Enhanced 2 p.m., Extended noon.

4.7 Additional Appointment Time

Known additional hours must be requested and booked at least 12 hours before the original scheduled start; later planned requests are denied. An unforeseen same-visit overrun may be approved only with client consent, availability, and electronic prepayment before extra time begins. Approved time costs $8.25 per 15-minute increment, rounded up for partial increments. Up to one unplanned extra hour may be considered; longer extensions need advance arrangements. Existing bookings, their one-hour buffer and approved operating hours must be preserved. KCLS never charges for unapproved time or its avoidable delays.

4.8 When Your Tasks Are Completed Early

If planned tasks finish early, KCLS offers other eligible approved tasks for the remaining reserved time. If the client declines or chooses to end early, the full selected package price remains payable; unused package time is not refundable for that choice. Approved extra time follows the extension policy. If KCLS ends service early, undelivered prepaid time is fairly refunded without unfairly imposing a package minimum.

4.9 Waiting Time During Errands

Reasonable approved errand waiting is included in appointment time. Any extension requires mutual approval and electronic prepayment. KCLS does not bill unreasonable delays caused by its own actions or errors.

4.10 When KCLS Arrives Late

KCLS allows a 15-minute provider-arrival grace period and promptly communicates anticipated delays. Your full prepaid service duration remains protected. The clock starts when KCLS actually arrives and is ready; we will agree on an adjusted end time. If you cannot extend the appointment, undelivered prepaid minutes will be refunded precisely or another mutually agreed alternative documented. The provider grace period never shortens paid service time.

4.11 When the Client Is Delayed

If KCLS arrives on time and is ready but you or your authorized adult are unavailable, billable time may begin at the confirmed start. KCLS makes reasonable contact attempts and allows a separate 20-minute grace period for access. There is no unattended entry; a documented no-show may be assessed under Section 6. The client-access grace period is distinct from KCLS’s 15-minute provider-arrival grace period.

4.12 Other Approved Charges

Only disclosed and approved extended-commute charges, additional errand mileage, tolls/parking, the $50 flat weekday after-hours convenience fee, and other mutually approved expenses apply. KCLS does not impose undisclosed charges when a task becomes more complicated.

4.13 Our Commitment to Fair Pricing

Rates and package minimums follow the selected package. Material price changes
follow the Client Service Agreement and policy-update procedures; previously paid appointments are not retroactively repriced. We aim for affordable, dependable, transparent assistance.

SECTION 5 | SCHEDULING, PAYMENTS & FLEXIBLE ARRANGEMENTS

Package prices plus 8.25% sales tax: Essential $142.89; Enhanced $214.34; Extended $285.78. Separately approved fees are additional; confirm their tax treatment and disclose the full total before payment.

5.1 Our Regular Hours

Regular hours: Monday 8 a.m.-6 p.m.; Tuesday-Friday 8 a.m.-8 p.m. Saturdays are individually approved at regular package rates; Sundays closed. No emergency, on-call or around-the-clock availability.

5.2 After-Hours Appointments

Approved visits outside that weekday's regular hours carry a $50 flat fee per visit, disclosed and prepaid. Approval is discretionary. For example, after 6 p.m. Monday or after 8 p.m. Tuesday-Friday is outside regular hours.

5.3 Observed Holidays

Closed on New Year’s Day, Memorial Day, Juneteenth (June 19), Independence Day, Labor Day, Thanksgiving Day and Christmas Day. Use actual holiday dates only; no extra Friday or Monday closure when a holiday falls on a weekend. Affected recurring visits may be rescheduled without penalty. See the 2027 calendar.

5.4 Requesting and Confirming Appointments

Request visits 48 hours ahead whenever possible; shorter notice is discretionary. Requests may be made up to 60 days ahead. KCLS schedules and sends invoices by text or confirmed email; confirmation requires approval and required prepayment. Solo visits cannot overlap; preserve a one-hour Square buffer plus needed travel. Latest regular starts: Monday - Essential 2 p.m., Enhanced noon, Extended 10 a.m.; Tuesday-Friday - Essential 4 p.m., Enhanced 2 p.m., Extended noon. Known extra hours follow the 12-hour rule; unforeseen overruns follow Section 4.7.

5.5 Electronic Payments

KCLS accepts approved electronic payments only through its designated secure payment process, including Square; no cash or checks. A screenshot or message claiming payment is not proof of successful authorization. Ordinary payment-processing fees are absorbed by KCLS and are not added as a routine client surcharge. Every appointment must be fully paid before services begin.

5.6 Weekly and Monthly Advance Payments

Recurring clients may choose monthly advance payment, which KCLS prefers, or weekly advance payment. Monthly balances are ordinarily due five calendar days before the first appointment of the service month. Weekly balances are due 48 hours before the first appointment of the service week. KCLS ordinarily sends one courtesy reminder 48 hours before the applicable deadline by the client’s preferred text or email method. There is no automatic weekly-payment surcharge.

5.7 Flexible Payment Arrangements

We understand that financial circumstances differ. New and returning clients may request individually approved due-date extensions or split electronic payments for future appointments without an accommodation fee or late fee. There is no fixed maximum number of installments, but each individual appointment must be fully prepaid before it begins. KCLS does not extend credit or deliver services against unpaid balances. Any revised deadline or arrangement must be confirmed in writing; an accommodation is not a guarantee of an unpaid booking.

5.8 Missed Payments and Future Booking Privileges

If an agreed payment deadline passes, KCLS may release or reschedule an unpaid appointment. Repeated, documented missed arrangements may result in a requirement to pay future appointments in full in advance. After three consecutive months of satisfactory payment history, the client may request reconsideration of installment privileges; reinstatement is not guaranteed and any decision will be communicated in writing.

5.9 Tips and Personal Gifts

Voluntary electronic gratuities are welcome but never requested, expected, or automatically added. Clients are never pressured to tip. Small, inexpensive nonmonetary gestures such as a card, cookies, or a modest personal gift may be accepted when appropriate. Cash gifts, checks, gift cards, and expensive gifts are not accepted. Voluntary electronic gratuities are distinct from prohibited cash gifts.

5.10 Respecting Your Budget

We disclose approved fees before booking and seek consent before any paid extension or added travel. Please ask if a charge is unclear; our goal is a transparent arrangement that fits your priorities.

SECTION 6 | CANCELLATIONS, RESCHEDULING, NO-SHOWS & REFUNDS

Plans change. We strive to balance flexibility for clients with the time and travel committed to every appointment.

6.1 Cancellations With At Least 24 Hours' Notice

Cancel at least 24 hours before the scheduled start and choose either a full refund of prepaid service and travel charges or a nonexpiring service credit. No cancellation fee applies.

6.2 Cancellations With Less Than 24 Hours' Notice

For cancellations within 24 hours of the scheduled start, KCLS may retain 25% of the scheduled service charge. The remaining service balance and prepaid travel fees for travel not undertaken will be refunded. Reasonable emergency exceptions may be granted after individual review.

6.3 Rescheduling Appointments

One reschedule per appointment is complimentary with at least 24 hours' notice, subject to availability. Further changes are individually reviewed. Rescheduling with less than 24 hours' notice may be subject to the late-cancellation policy. If KCLS initiates a schedule change, no client rescheduling fee applies.

6.4 Arrival and 20-Minute Grace Period

If KCLS arrives at the confirmed time ready to serve but the client or previously authorized adult cannot provide access, KCLS will make reasonable contact attempts and allow a 20-minute grace period. We do not enter unattended homes. When access is unavailable due to the client, billable time may begin at the confirmed start. A documented failure to provide access after the grace period may be treated as a no-show.

6.5 No-Show Service Charges

KCLS will attempt contact and allow a 20-minute grace period if the client or authorized adult does not provide access. For a documented no-show, the service charge follows the selected package: Essential $132, Enhanced $198, or Extended $264. Emergency exceptions may be considered. No no-show service charge applies when KCLS caused the failed appointment.

6.6 Approved Extended-Distance No-Shows - Review Required

For separately approved outside-radius appointments, the selected package service charge follows Section 6.5. The proposed retention of disclosed travel fees requires separate disclosure and acknowledgment and Texas attorney review for enforceability, including potential penalty concerns. Do not add a second service forfeiture to the package charge. Emergency exceptions and KCLS-caused failure protections remain. This travel-fee retention provision is not legally finalized.

6.7 When KCLS Arrives Late or Cancels

If KCLS arrives late, a 15-minute provider-arrival grace period applies, but the service clock begins only when we are physically present and ready. We promptly communicate delays and offer the full prepaid duration with an agreed adjusted end time. If you cannot extend the visit, undelivered minutes are refunded exactly or another mutually agreed alternative is documented; delay never reduces your paid time. If KCLS cancels before service, you choose a full refund or complimentary reschedule.

6.8 When a Visit Ends Early

If planned tasks finish early, KCLS offers other eligible approved tasks for the remaining reserved time. If the client declines or chooses to end early, the full selected package price remains payable; unused package time is not refundable for that choice. Approved extra time follows the extension policy. If KCLS ends service early, undelivered prepaid time is fairly refunded without unfairly imposing a package minimum.

6.9 Service Quality Concerns

We review concerns fairly and may offer corrective assistance, a partial refund, nonexpiring service credit, or complimentary time depending on the circumstances. Substantially delivered services do not automatically qualify for a full refund. Full refunds are available where no service was provided or required by law.

6.10 Refund Processing and Credits

After approval, KCLS initiates eligible refunds within five business days, ordinarily to the original payment method where possible. KCLS does not impose a refund-processing fee; financial institutions may take additional time to post funds. Service recovery credits do not expire. Clients may choose a nonexpiring credit in place of an eligible refund; unused prepaid services otherwise remain refundable subject to applicable lawful cancellation charges. Fairness, communication, and respect guide every refund decision.

SECTION 7 | YOUR HOME, YOUR PRIVACY & OUR SAFETY STANDARDS

Your home is personal. We enter it as invited professionals, with respect for your space, belongings, privacy, and safety.

7.1 Authorized Home Access

KCLS does not accept house keys, gate codes, garage codes, smart-lock credentials, or other independent access methods. We do not enter unattended homes or access homes outside approved appointment hours. The client or an adult age 18 or older specifically authorized in writing must grant entry and remain on the premises throughout in-home services. Home-entry authorization does not automatically authorize access to private records or decisions.

7.2 Respect for Property and Valuables

We ask permission before rearranging belongings. We never discard, donate, or remove property without express authorization. We do not routinely handle cash, financial accounts, jewelry, or valuables, and may decline to handle highly valuable items regardless of permission. Property concerns or accidental damage will be documented and reviewed fairly, including applicable insurance where appropriate.

7.3 Safe Household Supplies

Clients supply household cleaning products, tools, laundry products, and food ingredients required for requested tasks. KCLS may carry basic business supplies but clients should not rely on them. We follow product instructions, avoid mixing chemicals, and decline hazardous, contaminated, heavy, elevated, or otherwise unsafe work.

7.4 Pets, Smoke, and Environmental Conditions

Pets are welcome when safely managed. Aggressive animals may need to be secured; service animals are accommodated as required by law. Smoking households are not categorically excluded, but KCLS may reasonably request that smoking or vaping not occur in the immediate work area and may pause or modify services if conditions are unsafe. Severe weather, heat, flooding, air quality, or other hazards may require safe alternatives, postponement, or fair cancellation.

7.5 Client Information and Written Permissions

We keep client information confidential and disclose it to family or third parties only with appropriate written client authorization or as permitted or required by law. Paying for services does not confer automatic access to client information. Scheduling contacts, payment contacts, information recipients, emergency contacts, home-entry adults, and legal representatives are separate roles. KCLS verifies applicable authority and honors revocation subject to law. A capable client retains decision-making authority; a representative acts only within documented legal authority.

7.6 Records Access and Retention

Receive your completed signed set at signing. KCLS scans its signed set, checks every page for completeness and readability, stores scans in restricted business storage and keeps original paper records locked. Additional eligible copies may be requested after identity and authority verification; response target: five business days, without routine copy fees. Digital safeguards include unique accounts, MFA where supported, secure transmission, backups and access review. No personal cloud/email storage or unapproved devices. Investigate suspected disclosure and notify as required. Retain records at least seven years after service ends, longer for law/legal hold, then securely dispose.

Selected digital archive: OneDrive Business. Access and recovery settings must be verified; storage selection alone does not prove safeguards are configured.

7.7 Safety, Boundaries, and Emergencies

KCLS is not an emergency responder or protective-supervision provider. If there is an apparent medical emergency or fall, injury, fire, smoke or gas odor, severe weather, flooding, power outage, violent threat, missing or unreachable client, vehicle incident during an errand, or other immediate danger, personnel prioritize safety, contact 911 or other appropriate emergency services when warranted, and follow official shelter or evacuation instructions. KCLS notifies an authorized emergency contact when appropriate. We do not provide clinical assessments, treatment, lifting, transfers, rescue, or protective supervision. Unsafe service may be paused or ended, with fair reconciliation of undelivered prepaid time. We document factual observations, actions, and notifications.

7.8 Changing Needs

If a client develops needs requiring personal care, clinical care, or supervision, KCLS may continue only independent concierge tasks that can safely be provided within scope. We will discuss appropriate adjustments or transition to qualified providers and address unused prepaid services fairly. Your dignity, privacy, and safety are never secondary to a completed checklist.

SECTION 8 | CLIENT RIGHTS, RESPONSIBILITIES & COMMUNICATION

At KCLS, meaningful assistance begins with mutual respect. We want clients to feel heard, informed, and in control of their choices.

8.1 Your Rights as a Client

You have the right to dignity, respect, nondiscriminatory treatment, clear information about services and charges, informed consent, appropriate privacy, and the ability to decline requested tasks. You may raise good-faith concerns without retaliation, request eligible records, and end your relationship under the agreed terms. Our separate Client Rights & Responsibilities acknowledgment is not a waiver of these rights.

8.2 Your Responsibilities

Please provide accurate service and contact information, identify relevant safety concerns, make appropriate supplies available, treat KCLS personnel respectfully, and complete agreed electronic prepayments. For in-home appointments, you or a previously written-authorized adult age 18 or older must provide access and remain on the premises. Please keep pets and work areas reasonably safe.

8.3 Our Responsibilities to You

KCLS will arrive prepared when reasonably possible, remain within its approved nonmedical scope, communicate schedule and charge changes, respect confidentiality, document services accurately, address safety concerns, and respond to complaints professionally.

8.4 Choosing Authorized Contacts

Clients may designate different individuals to assist with scheduling, payments, information sharing, emergencies, home access, or legal decisions. Each role is separately documented. A payer or family member does not automatically receive confidential information or authority over the client.

8.5 Questions, Concerns, and Complaints

We encourage clients to share concerns by phone, email, or another approved communication channel. KCLS aims to acknowledge complaints within one to two business days and resolve ordinary concerns within four to five business days when feasible. Urgent safety concerns receive prompt attention. Complex issues may require more time, and we will communicate updates. We document concerns and do not retaliate against good-faith complaints.

8.6 Fair Solutions

Depending on the circumstances, KCLS may offer corrective assistance, complimentary time, a partial refund, or a nonexpiring service credit. Remedies are assessed individually and consistently with the agreement and applicable law.

8.7 Professional Boundaries

Our welcoming approach never replaces professional boundaries. KCLS personnel do not accept financial control, personal access credentials, or responsibilities beyond the approved scope. Respectful communication is expected from everyone involved.

8.8 Feedback and Marketing Choices

We welcome optional satisfaction feedback, including ratings and suggestions. Permission to use names, testimonials, photographs, or videos in marketing requires separate voluntary authorization and may be revoked for future use subject to law. We do not reward positive public reviews.

8.9 A Partnership Rooted in Respect

You remain the decision-maker in your own life whenever legally capable. Our role is to listen, support approved tasks, and communicate with care. Your voice matters here. A Little Help. A Lot of Heart.

SECTION 9 | SERVICE RECORDS, CLIENT FEEDBACK & LEGACY REWARDS

Every experience matters. Every relationship has value. We believe accountability and gratitude should be part of the everyday KCLS experience.

9.1 Documenting Your Services

KCLS maintains a brief secure internal digital record of each appointment, including actual start and end times, completed tasks, approved extensions and charges, and relevant factual issues. Records support transparency, service quality, and resolution of concerns. Confidential documents and signed agreements are retained within approved access-restricted business systems.

9.2 Service Completion Summaries

One-time clients receive a summary following the completed visit. Weekly recurring clients receive a consolidated weekly summary. Monthly recurring clients receive a consolidated monthly summary. Summaries may describe services delivered, time, approved charges, and relevant nonclinical updates.

9.3 Client Acknowledgments

Clients may sign a paper summary with intent to acknowledge receipt. Provide a copy and retain the signed original and scan. Allow five calendar days to acknowledge; absent acknowledgment, mark Administratively Finalized - No Acknowledgment Received. Silence is not agreement or waiver. Missing signatures do not determine future eligibility.

9.4 Optional Feedback

Clients may share optional ratings, suggestions, and concerns. Feedback helps improve service but is never a condition of continued eligibility. Marketing use of identifiable feedback, photos, videos, or names requires separate voluntary consent, revocable for future use subject to law. No incentive is provided for positive public reviews.

9.5 Introducing Legacy Rewards

The proposed Legacy Rewards Program thanks existing clients for qualifying first-time referrals. When a new client names the referring client during initial inquiry or enrollment, before their first completed appointment, and then pays for and completes that first qualifying appointment, the referring client may earn a $10 service credit. A referral cannot be added retroactively after that first visit. Former or returning clients are not qualifying new referrals.

9.6 Limits and Redemption

Clients may earn credits for up to three qualified referrals per calendar month, or $30 in new credits per month. Earned credits never expire, have no cash value, are nontransferable, and cannot be exchanged for cash. Clients may apply any portion of available credit toward eligible future service; any remaining appointment amount must be electronically prepaid before service.

9.7 Program Review and Changes

Legacy Rewards is not active until legal and compliance review is completed and KCLS announces its launch. KCLS may modify or discontinue the program with appropriate notice, but valid credits already earned remain honored under their applicable terms. Referral eligibility does not guarantee service acceptance.

9.8 Inactive Accounts

An account may be classified inactive after 12 months without a completed appointment. There is no inactivity or reactivation fee. Earned credits remain valid and available for eligible future services if the client returns, even if the prior service relationship ended. We may verify updated information before accepting new bookings.

9.9 Growing Together

Whether you share feedback, refer a neighbor, or simply allow us to help with your day, your trust contributes to our legacy. You are more than an appointment on our calendar.

SECTION 10 | CONTINUING SERVICES, POLICY UPDATES & ENDING YOUR SERVICE

RELATIONSHIP Relationships built on trust, not obligation. We hope to serve you for as long as our assistance remains helpful, appropriate, and welcome.

10.1 Continuing Your Services

One-time visits and weekly or monthly recurring arrangements are available. The agreed recurring schedule continues until canceled, subject to availability, existing appointment cancellation rules, advance payment, and approved scope. Record the package, actual dates or weekday/time pattern, reserved start/end times, and payment period in the service plan or Recurring Visit Schedule Confirmation. Confirm appointments within the existing 60-day booking horizon; continuation does not guarantee indefinite availability. Total each payment period from its actual reserved visits. Clients may stop future recurring visits through existing service contact channels. Existing per-appointment cancellation and unused-prepayment reconciliation rules apply; no new recurring cancellation fee or minimum term is added. Recurring schedules do not independently authorize automatic card charges.

10.2 Annual Information Review

For ongoing clients, KCLS generally reviews contact information, communication preferences, authorized contacts, service needs, scheduling preferences, and household safety information annually. Significant changes may require an earlier review. Routine annual reviews do not automatically require a new agreement.

10.3 Your Client Service Agreement

Review and sign the Agreement before the first confirmed appointment; that signature acknowledges receipt of this guide. No separate handbook signature or new agreement for each visit is required. Both parties sign and date two matching paper sets and each retains one. Material contractual changes require updated consent or signatures. This guide supplements but does not independently override the Agreement.

10.4 Updates to Our Policies

KCLS will provide reasonable advance notice of policy changes, whenever practical at least 14 calendar days for material changes. Material contractual terms cannot be imposed merely by editing the handbook. Changes do not retroactively reprice or alter paid appointments. Immediate safety, legal, or insurance restrictions may require prompt adjustments, with fair alternatives, rescheduling, or refunds.

10.5 Ending Services at Your Request

You may discontinue services or request account closure at any time, without a closure fee. Scheduled appointments remain subject to lawful agreed cancellation provisions. Eligible unused prepaid services will be refunded, or you may elect a nonexpiring service credit. You may also request that promotional messages stop.

10.6 When KCLS Must Discontinue Services

KCLS may terminate services for legitimate documented reasons such as serious safety risks, harassment, repeated policy violations, repeated payment failures, or needs outside its scope, without unlawful discrimination or retaliation for good-faith complaints. For ordinary nonurgent termination, we generally provide seven calendar days' written notice with the reason, effective date, affected appointments, and financial accounting. Urgent safety situations may require immediate action with notice as soon as reasonably practicable.

10.7 Financial Reconciliation

At termination, KCLS reviews services actually delivered, eligible unused prepaid amounts, approved charges, and applicable lawful cancellation fees. No separate termination fee applies. Refunds follow the agreement and applicable law. Earned Legacy Rewards credits never expire and have no cash value; they remain available toward eligible future appointments if a client returns.

10.8 Returning to KCLS

Former clients may submit a new inquiry. KCLS may request updated details and documentation, and appointments depend on current availability, rates, eligibility, and policies. There is no general reactivation fee.

10.9 Records After Service Ends

Client records remain confidential after the relationship ends and are generally retained for at least seven years, or longer as required by law or legal hold. Eligible record requests remain available through identity verification.

10.10 A Lasting Connection

We want your experience to feel meaningful whether you need assistance for one afternoon or many years. Our purpose is to support your independence—not create dependence on KCLS. With a little help and a whole lot of heart, we build a legacy rooted in compassion, purpose, and respect.

7.9 | Safeguarding and Reporting

CLIENT HANDBOOK ADDITION | READ WITH SECTIONS 7, 8 AND 10 | 2026.10.31.1 | October 31, 2026

You have the right to respectful service, professional boundaries, privacy and freedom from abuse, neglect, exploitation and retaliation. KCLS prohibits mistreatment by its owner and anyone acting for the business. You may report directly to outside authorities, including concerns about KCLS itself.

Immediate danger: call 911

For suspected abuse, neglect or exploitation of a person age 65 or older or a qualifying adult with a disability in a community setting, call the Texas Abuse Hotline: 1-800-252-5400, available 24/7. Use the same hotline for suspected child abuse or neglect. Report concerns promptly; you do not need proof or KCLS permission.

For allegations involving nursing homes, assisted living facilities or certain regulated providers, call Texas HHS Complaint and Incident Intake: 1-800-458-9858. Tell intake the setting and provider so it can identify the proper route. For other regulated settings, contact the responsible agency. Emergencies still require 911.

The DFPS website, txabusehotline.org, is for nonurgent reports only. Call instead when urgent or a response is needed within 24 hours. KCLS personnel follow immediate telephone reporting procedures.

You can speak up without retaliation

Contact KCLS at 281-881-4766 or support@kclslegacycare.com for service concerns. These channels are not emergency services and are not continuously monitored. Ordinary complaint response times do not apply to urgent safeguarding reports. If the concern involves the owner, you may go directly to the outside authority without notifying the owner first.

KCLS will not retaliate for good-faith concerns or cooperation with authorities. We protect information and share it only with appropriate authorization or as permitted or required by law. A mandatory report does not require client or family permission. We do not automatically notify a person suspected of mistreatment.

Safe assistance within our concierge scope

KCLS does not provide personal care, childcare, protective supervision, clinical care or client transportation. When needs change, we discuss safe service limits and appropriate transitions. If immediate danger arises, we seek appropriate emergency assistance. Reporting concerns does not change prices, refund rights or your signed agreement.

This is information, not a waiver. No client signature or return is required. The full Prevention and Reporting of Abuse, Neglect, Exploitation and Abandonment policy is available from KCLS and the Client Resources page. Sources: Texas Human Resources Code Chapter 48; Texas Family Code Chapter 261; txabusehotline.org; hhs.texas.gov/contact.