Legal documents

Website policies, service disclosures and agreement templates

WitnesSource | October 6, 2026

The website policies describe current operations. The agreement and consent documents are unexecuted templates: complete the legal parties, scope and material terms, obtain appropriate legal review, and secure each required signature before use. Downloading this pack does not accept an engagement or authorize payment.

Contact: jaiello@witnessource.com or witnessource.com/contact/

01. Website Terms of Use

02. Privacy Policy

03. Expert Screening & Independence Disclosure

04. Cookies & Website Technology Notice

05. Payments, Cancellations & Service Disclosures

06. Expert Participation Agreement

07. Client Search & Introduction Agreement

08. Independent Expert-Client Engagement Agreement

09. Mutual Confidentiality & Information Handling Agreement

10. Expert Profile & Marketing Consent

11. Optional Services Order & Delivery Agreement

12. Sponsorship & Advertising Order

Independent experts contract with and are paid directly by clients. Basic approved profiles, applications and initial inquiries remain free. Optional profile plans and sponsorship remain prelaunch. No expert, assignment or result is guaranteed.

Website Terms of Use

Website policy | Version 2026-10-06

Using this website, requesting an introduction and understanding the limits of our role.

Scope and separate agreements

These terms describe use of witnessource.com, the WitnesSource website. WitnesSource is the service brand used on this site. A paid service or expert engagement requires a separate written agreement identifying the actual contracting parties and their authorized representatives. Browsing, applying, asking a question or downloading a template does not sign one of those agreements. If you do not accept these website terms, discontinue use. Mandatory legal rights remain available.

What WitnesSource provides

We receive requests, review professional information and may help identify independent specialists. Specialty categories describe fields we may seek to source; they do not establish that a screened specialist is currently available. An application is not acceptance, a profile is not a court qualification, and an introduction is not a recommendation for every matter. Availability, permitted scope, credentials, conflicts and terms must be reviewed for the particular assignment.

Professional independence

WitnesSource does not provide legal representation or control an independent expert's analysis. General website material is not legal, medical, engineering, investment or other professional advice for your circumstances. A court or other decision maker determines whether testimony is admissible. No outcome, opinion, assignment, search ranking or number of leads is promised. An expert contracts with and receives professional fees directly from the retaining client.

Free requests and optional fees

Client inquiries, expert applications and basic approved profiles are free. A managed search requires a separately agreed fixed client matching fee, stated in writing before proceeding, payable only upon retention of an expert presented through that agreed search. No standard matching fee or commission is imposed by these terms. Optional editorial work and resources require a written order. Profile enhancements and sponsorship are prelaunch interest only until separately activated; there is no automatic enrollment or billing.

Accurate and authorized submissions

Submit accurate information that you have authority to share. Do not upload privileged correspondence, case files, patient records, account numbers or other sensitive case material through the initial forms. Acknowledgment of a form does not reserve availability or establish confidentiality, privilege, an expert engagement or an attorney-client relationship. Tell us promptly about a material correction to information you supplied.

Permitted use and intellectual property

You may view this site and use its public templates to discuss a potential WitnesSource arrangement. Do not misrepresent another person's identity, infringe intellectual property or privacy, interfere with the site, introduce malware, bypass access controls, harvest contact details for bulk solicitation or republish the directory as your own. WitnesSource branding and original site materials remain with their respective owners. Expert-supplied materials remain subject to their owners' rights. No employer or professional association endorsement is implied by an accurate background reference.

Availability, third parties and responsibility

Site information is provided as available and can contain mistakes or become outdated. We do not guarantee continuous access, completeness or suitability for a particular matter. Linked services and payment providers have their own terms and privacy practices. Each party remains responsible for its own conduct and obligations. These terms do not exclude liability that cannot lawfully be excluded, excuse fraud or intentional misconduct, or remove a remedy required by law. Any negotiated allocation of liability belongs in the relevant signed agreement.

Restrictions, changes and questions

We may restrict misuse, remove inaccurate or unauthorized content, or decline an unsuitable request. A restriction does not erase payment, record preservation or other obligations already lawfully incurred. Material changes to an existing paid engagement require the agreement applicable to that engagement; a website revision does not silently replace it. Contact WitnesSource through /contact/ or jaiello@witnessource.com for corrections, complaints, accessibility help or questions. This version is dated October 6, 2026.

Privacy Policy

Website policy | Version 2026-10-06

Information collected through applications, inquiries, email, analytics and hosted payments.

Scope and contact

This policy describes the current WitnesSource website and related inquiry and application handling. Updated October 6, 2026. Questions and requests can be submitted at /contact/ or to jaiello@witnessource.com. The service is intended for adults acting in a professional capacity. Do not submit a child's personal information.

Information collected

We receive the information you choose to provide, such as name, professional email, phone, organization, specialty, location, role, qualifications, CV or professional profile link, availability, rates and a nonconfidential description of the assistance requested. We also keep correspondence, submission references, review status, relevant public professional source information and records needed to administer an accepted order. Please omit sensitive case documents, financial account information, government identifiers and patient records from initial contact.

Use and sharing

We use information to answer requests, review potential fit, verify relevant professional facts, consider conflicts, arrange permitted introductions, administer services, improve the website and protect it from abuse. Limited information needed for an introduction may be shared with the relevant prospective client or specialist after considering permission and conflicts. A submitted CV is not automatically a public profile. Public use of an expert's name, image, CV or promotional text requires the applicable approval. We do not sell application or inquiry records or use them for cross-context behavioral advertising.

Service providers and storage

The site uses WordPress on GoDaddy hosting. Form submissions are stored in the WordPress database and sent to the administrator by email. Uploaded CVs are handled as administrator email attachments for review and are not automatically published. Resend processes website transactional email. Microsoft 365/Outlook supports branded correspondence; historical notifications and correspondence also exist in the administrator's Google/Gmail account. Cloudflare Turnstile provides abuse protection. Providers receive information needed for their functions and apply their own security and retention practices. Records may be processed in the United States and other countries where providers operate.

Analytics and technical records

Independent Analytics records visit and page statistics in the WordPress database, including referring sites and general device and geographic information. Its website analytics does not use tracking cookies. Hosting, security and email systems may separately process IP addresses, device information, delivery records and security logs. Google Search Console supplies search performance information. Form records and CVs are handled separately from page-view reports. See /cookie-notice/ for the technology notice.

Payments

Accepted orders may use external Stripe or PayPal hosted checkout. Those providers collect and process payment details under their own terms. Do not enter card or bank information into a WitnesSource inquiry form. We use order references, payer/contact details and provider transaction information when available to reconcile accepted orders, delivery, disputes and refunds. A request or checkout visit does not establish that payment succeeded.

Retention, security and legal requests

We retain information while needed for a request, review, service, accounting, security, dispute or other applicable obligation. Retention depends on the record and circumstances; there is no promise of immediate erasure from backups or third-party systems. Access is intended for people and providers who need it for the stated purposes. No website or email system can guarantee absolute security. Contact us if information was sent in error or may have been exposed. We may preserve or disclose records when lawfully required, to protect rights and safety, or to handle a dispute, subject to applicable law.

Your choices and rights

You may ask to access, correct or delete information you supplied, withdraw optional marketing permission, or stop commercial email. Use /contact/ or jaiello@witnessource.com and identify the relevant submission or profile without including sensitive identity documents in the first message. We may verify your authority and retain records where a lawful reason requires it. Rights and response deadlines depend on the law that applies; where applicable you may use an authorized agent, appeal a denial or contact the relevant regulator. We will not charge or disadvantage you for exercising a right where prohibited. Replying to stop marketing does not prevent necessary communications about an existing request or legal obligation.

Changes

The current version is published here. Material changes affecting an existing arrangement will be communicated where required. Continuing to browse does not provide consent for an unrelated new use that requires separate consent. External sites linked from WitnesSource have their own privacy practices.

Expert Screening & Independence Disclosure

Service disclosure | Version 2026-10-06

What application review means, what clients must confirm and how independent opinions are protected.

Applications, profiles and assignments

An application starts a review. It does not establish that an applicant has been accepted, independently credentialed, retained or approved to testify. A basic approved profile may be published only after review and the expert's approval of the public content. A profile does not establish current availability or suitability for every assignment. Ask what was checked, when it was checked and what remains self-reported.

Review for the actual matter

Before presenting an expert for a matter, our process calls for review of relevant background, scope, credentials, conflicts, availability and terms. Verification must be recorded rather than inferred from a CV. A title, membership, academic degree or foreign credential is not automatically a license to practice a regulated profession in a particular US state. Required licensing and permitted scope must be resolved for the proposed work and location. The retaining party should independently assess the candidate and any additional requirements.

Employer duties and conflicts

Experts must identify restrictions affecting outside work, former or current employer confidentiality, prior work for parties and any other material conflict. A relevant employment history is not permission to use an employer's information. A preliminary conflict check uses limited party and matter details. Do not circulate confidential files until recipients, authorization and handling terms have been agreed. A new conflict or restriction must be disclosed before further work.

Independent opinions and testimony

Professional opinions must follow the expert's own analysis and applicable standards. No one may promise a desired conclusion, conceal unfavorable material, purchase testimony or make expert compensation depend on the litigation result. Consulting experience and deposition or trial experience must be described separately. Court qualification and admissibility are matter-specific decisions, not a status conferred by this website.

Fees, sponsorship and coverage

Payment for CV editing, a future profile enhancement or sponsorship does not purchase acceptance, priority based on suitability, credentials or a recommendation. Basic approved profiles remain free. Specialty pages may describe intended sourcing areas where no currently reviewed candidate is available. An inquiry does not reserve a specialist or guarantee an introduction.

Corrections and concerns

Report a credential concern, conflict, inaccurate profile or suspected misuse through /contact/. Include the profile or submission reference and a concise factual explanation. We may seek supporting information, pause a proposed introduction or remove disputed promotional material while reviewing the issue. No specific resolution or response time is promised. Legal deadlines remain the responsibility of the retaining party.

Cookies & Website Technology Notice

Website policy | Version 2026-10-06

Essential technology, cookieless analytics and the separate services used for checkout.

Current website technology

WordPress, hosting and security services may use essential cookies, session information and technical logs for administration, delivery and abuse prevention. Cloudflare Turnstile evaluates submission-related browser signals to help prevent spam. Its operation is distinct from consent to receive marketing.

Audience measurement

WitnesSource uses Independent Analytics for page, referrer, device and general geographic statistics stored in the website database. This analytics implementation does not use tracking cookies. Google Search Console provides search performance reporting. We have not implemented advertising pixels or an on-site behavioral advertising campaign as part of this setup. This notice must be updated before adding materially different tracking.

External services and controls

Stripe, PayPal and other external sites may use their own cookies or similar technology when you visit them. Their notices and controls apply on their services. You can manage cookies through your browser; blocking necessary technology may affect forms or sign-in. WitnesSource does not presently provide a separate cookie preference dashboard. If optional tracking is introduced, any consent or opt-out controls required for that use must be implemented before it is enabled.

Questions

For information about data use and requests, see /privacy-policy-2/ or contact us at /contact/. Updated October 6, 2026.

Payments, Cancellations & Service Disclosures

Service disclosure | Version 2026-10-06

When charges can arise, who receives expert fees and how order-specific cancellation terms are confirmed.

No charge for initial contact

Client inquiries, expert applications and basic approved profiles are free. Sending a service request is not placing an order. No subscription or paid profile is activated by an inquiry, application or expression of interest.

Managed search

A fixed client matching fee must be quoted and accepted in a separate written search agreement before proceeding. It becomes payable only if the client retains an expert presented under that search. There is no fee merely for submitting a request or reviewing a candidate. The written agreement must identify the matter, presented expert, amount, payer and payment timing. No success fee based on damages, recovery or the expert's opinion is offered.

Independent expert charges

Experts set their own rates, retainers, expenses, minimums and cancellation terms. Those amounts are agreed with and paid directly to the expert under a separate engagement. WitnesSource does not hold client funds for experts, pay out expert retainers or guarantee an expert's collection or performance. Jason Aiello's separate consulting rates are described on his profile and must be confirmed for an actual engagement.

Editorial services and the Organizer

Editorial projects are quoted by scope. The Expert Practice Organizer is offered at $150 USD as a one-time digital pack. Before payment, obtain written confirmation of the exact deliverables/version, permitted use, delivery date, price, any applicable tax, and cancellation/refund terms. Use the confirmed WS-S order reference at the supplied hosted checkout. Delivery is by email after provider payment confirmation. No automatic fulfillment or trial subscription is currently offered.

Cancellation, refunds and disputes

The written order must explain what happens if either party cancels, if work has already begun, or if delivery cannot occur as agreed. We do not impose a blanket no-refund rule through this page. Contact us with the order reference promptly if a charge or delivery appears incorrect. Any agreed refund is processed through the original provider where feasible, subject to provider timing and applicable law. Mandatory consumer, payment dispute and refund rights are not waived.

Plans that are not yet open for purchase

Optional annual profile plans remain prelaunch: Essentials $99, Expanded $399, Multimedia $499, Small Practice $549 and Organization $899 USD. Newsletter placement at $99 per issue and resource-page placement at $149 are also prelaunch figures. Availability, actual audience, deliverables, duration and terms must be confirmed before activation. No automatic renewal is currently offered. Paid placement must be identified and cannot influence qualification screening.

Payment safety

Use only a checkout or invoice confirmed for your order. Do not send card details, bank credentials or confidential case records in a website form or email. Confirm the seller and payment details shown by the provider before paying. Ask through /contact/ if an invoice or payment request is unexpected.

Expert Participation Agreement

Agreement template - not executed | Version 2026-10-06

Nonexclusive participation, accurate qualifications, independence, permissions and responsibilities.

TEMPLATE - NOT EXECUTED. Complete all material fields and obtain appropriate legal review and written acceptance before use. No signature or agreement is created by viewing this document.

Completion schedule

WitnesSource contracting legal person/entity and address:

_____

Expert legal name, business entity, address and email:

_____

Authorized representatives and effective date:

_____

Permitted specialties and jurisdictions; exclusions:

_____

Credential verification record and insurance requirements, if agreed:

_____

1. Formation and scope

This template is for completion and legal review. It has no effect merely because it is downloaded or an expert applies. The identified parties must accept the completed version in writing. Participation is nonexclusive and does not guarantee a listing, referral, workload, revenue or acceptance for a matter. Each party can decline a proposed engagement before making a separate binding commitment.

2. Accurate background and permitted work

The expert will supply accurate current background, relevant qualifications, license status, professional experience and material restrictions. The expert will distinguish consulting, deposition and trial experience; notify WitnesSource of material corrections; and provide reasonable evidence for claimed qualifications. The expert will not accept work outside lawful authority or competence. WitnesSource will record the review actually performed and will not represent unverified claims as verified.

3. Employer restrictions and conflicts

The expert will obtain any required employer or third-party permission and observe current and former confidentiality obligations. Before accepting each matter, the expert will review disclosed parties, subject matter and relationships and report material conflicts or restrictions. The client remains responsible for its own conflict requirements. If a restriction or conflict emerges, substantive disclosure and work must pause while the parties determine a lawful next step.

4. Independent professional work

The expert controls professional methods and conclusions within the agreed assignment and applicable duties. No favorable opinion, testimony result or litigation outcome is promised. Professional compensation may not depend on a particular opinion or case result. Each expert-client engagement requires its own agreement. This participation agreement does not make the expert an employee, partner or agent authorized to bind WitnesSource; legal classification depends on the actual relationship.

5. Basic participation, fees and promotion

Basic approved participation is free. This agreement imposes no expert commission or mandatory purchase. An optional paid service requires a separate accepted order and does not affect screening. Public use of name, photo, biography, CV, logos or promotional copy requires a completed marketing/publication consent identifying the approved materials and channels. An application alone is not that consent. Expert materials remain owned by their respective owners.

6. Confidentiality and information handling

Use nonpublic information received for an opportunity only for the authorized purpose and disclose it only to authorized people with a need to know and suitable duties. Do not provide employer secrets, unauthorized personal records or material nonpublic information for securities trading. Required disclosures, protected reporting, court rules and lawful preservation obligations take priority. No attorney-client privilege or work-product protection is promised by this agreement. Use a matter-specific confidentiality agreement before sensitive exchange where appropriate.

7. Records, complaints and suspension

Keep appropriate professional records and comply with applicable preservation, disclosure and court requirements. Cooperate reasonably in correcting inaccurate promotional information and resolving factual complaints. WitnesSource may pause an introduction or public profile for a material unresolved concern. Either party may end participation by written notice; existing expert-client obligations and duties relating to confidentiality, accrued rights and preservation continue as applicable.

8. Responsibility and third-party claims

Each party is responsible for its own wrongful acts and contractual breaches. Subject to applicable law, a party will reimburse the other for reasonable, documented third-party losses to the extent caused by its knowing misrepresentation, unauthorized disclosure or infringement in materials it supplied. The requesting party must give prompt notice and reasonable cooperation. Defense control and counsel must be reasonably acceptable; no settlement may admit fault or impose a nonmonetary obligation on the other without consent. No party must cover the other's own negligence or misconduct. No liability cap, insurance minimum, arbitration requirement or restriction on future work is established unless separately negotiated and signed.

9. Protected disclosures

Nothing restricts lawful reporting to regulators, law enforcement or an attorney, participation in an investigation, or other nonwaivable rights. Under 18 USC 1833(b), qualifying confidential trade-secret disclosures to a government official or attorney solely to report or investigate suspected legal violations, and qualifying sealed court filings, can be immune from trade-secret liability. A retaliation claimant may use a trade secret with an attorney and in a sealed filing subject to the statute's conditions and court orders.

10. Acceptance and changes

Attach the completed fields, approved scope and any agreed addenda. Identify governing law, forum and any negotiated risk terms before signature with appropriate legal review. No provision waives a duty or right that cannot lawfully be waived. Changes require both parties' written acceptance. Electronic signatures and counterparts may be used when legally valid; preserve the accepted version, signers' authority and date. Signature fields: WitnesSource authorized representative, name/title/date; expert authorized representative, name/title/date.

Execution record

Party / authorized signer: _____
Signature: _____ Date: _____

Party / authorized signer: _____
Signature: _____ Date: _____

Final version / attachments: _____

Client Search & Introduction Agreement

Agreement template - not executed | Version 2026-10-06

A matter-specific search scope and fixed matching fee payable only upon retention.

TEMPLATE - NOT EXECUTED. Complete all material fields and obtain appropriate legal review and written acceptance before use. No signature or agreement is created by viewing this document.

Completion schedule

WitnesSource contracting legal person/entity and address:

_____

Client legal entity, authorized signer, payer and notice email:

_____

Matter reference, jurisdiction, specialty, scope and exclusions:

_____

Requested deadline and availability requirements:

_____

Fixed matching fee approved by owner and client; currency; invoice due terms:

_____

Named candidates covered and documented introduction dates:

_____

1. Written authorization

Complete this template, resolve open fields and obtain both parties' signatures before a paid managed search starts. A website inquiry is free and does not accept this agreement. WitnesSource will explore specialists for the defined assignment and communicate the status and limits of its review. No particular candidate, completion date or successful result is guaranteed unless a specific obligation is expressly included in the completed agreement.

2. Information and client requirements

The client will describe the needed work, relevant jurisdiction, deadlines and required qualifications accurately. State prohibited employers, conflicts, procurement restrictions and any additional screening required before outreach. Share only the minimum information needed initially. Obtain authority before disclosing another person's data or confidential material. Sensitive files require an agreed recipient, transfer method and handling terms.

3. Candidate review and retention

WitnesSource will identify what qualification information has been reviewed and material open questions when presenting a candidate. The client evaluates suitability and legal requirements, conducts any additional diligence, and chooses whether to retain the expert. The expert separately confirms lawful scope, conflicts, availability and terms. Neither a candidate presentation nor a request for a CV creates an expert-client engagement.

4. Matching fee trigger

The completed schedule must state one fixed matching fee approved in writing by the client and WitnesSource before proceeding. That fee is earned and payable only when the client actually retains an identified expert presented under this agreed search for the identified matter. No payment is due simply for asking, reviewing a candidate or declining to retain. Record retention with an accepted expert engagement or other reliable written evidence. Identify previously known or independently engaged candidates before agreeing that they are covered. The fee is unrelated to recovery, testimony or professional conclusions. No expert percentage commission or indefinite future-matter fee is created here.

5. Expert agreement and direct payment

The expert and client separately agree scope, professional rates, retainer, expenses, deadlines and cancellation. The client pays those amounts directly to the expert. WitnesSource is not the expert's employer, does not control opinions, is not a party to that professional engagement and does not hold or disburse the expert's fees. A matching fee does not purchase a favorable opinion or court admissibility.

6. Cancellation and unresolved searches

Either party may stop an uncompleted search by written notice, subject to duties already incurred under a completed agreement. If no covered expert has been retained, no matching fee is due under this model. Any agreed consequence of later retaining an already presented expert must be expressly recorded for the particular matter before signature; this template creates no automatic extended restriction. Do not continue billable search work or increase a fee without a written amendment.

7. Confidentiality, disputes and risk

Each party will use received nonpublic information only for the authorized purpose and preserve legal reporting, discovery and retention duties. Each remains responsible for its own conduct. A separate expert-client contract governs professional performance. No blanket release of WitnesSource's own wrongdoing is created. Any liability limit, indemnity, insurance requirement, governing law, forum or dispute process must be resolved and expressly set out in a signed addendum after legal review. Mandatory rights remain intact.

8. Acceptance

The completed agreement and signed addenda are the agreement for this search. No oral statement or website update changes its price or scope. Record the exact version and effective date, legal identities and signatory authority. Signatures: WitnesSource representative, name/title/date; client representative, name/title/date. Attach the approved fee schedule and matter scope. Do not sign with unresolved material fields.

Execution record

Party / authorized signer: _____
Signature: _____ Date: _____

Party / authorized signer: _____
Signature: _____ Date: _____

Final version / attachments: _____

Independent Expert-Client Engagement Agreement

Agreement template - not executed | Version 2026-10-06

A starting document for the expert and retaining client to agree professional work and direct payment.

TEMPLATE - NOT EXECUTED. Complete all material fields and obtain appropriate legal review and written acceptance before use. No signature or agreement is created by viewing this document.

Completion schedule

Expert legal name/business, address and authorized signer:

_____

Retaining client legal identity, counsel, payer and notice contacts:

_____

Matter reference and jurisdiction; consulting or testifying role:

_____

Scope, excluded services, deliverables, deadlines and dependencies:

_____

Rates, retainer, replenishment, minimums, travel and expense approval:

_____

Billing, cancellation, refund and lawful withdrawal terms:

_____

Licenses, insurance, evidence custody and data-transfer requirements:

_____

1. Parties and role

This is a template for direct agreement between the identified expert and client. WitnesSource is not a party and does not sign or collect payment under it. The parties must complete and adapt it for the jurisdiction and matter, obtain appropriate legal review and accept the final version before work begins. Identify who may instruct the expert and who is legally responsible for invoices.

2. Scope and qualification

Specify the questions, methods of assistance, deliverables and exclusions. Distinguish consultation, document review, inspection, testing, written report, deposition and trial. The expert will disclose qualifications and relevant limits accurately and accept only work within competence and lawful authority. A consulting assignment does not automatically authorize testimony or regulated professional work. Changes in role, scope, site or deadline require written agreement.

3. Independent analysis

The expert will use professional judgment and appropriate methods, consider material contrary information and communicate significant limitations. The client may request clarification and factual corrections but may not direct a false or predetermined opinion. No finding, admissibility ruling or litigation result is guaranteed. Fees compensate time or defined work and do not depend on a particular opinion, recovery or case outcome.

4. Conflicts and outside duties

Before substantive work, review the parties, affiliates, prior engagements and employer restrictions. Obtain necessary permission and identify any limits on access or disclosure. Notify the other party promptly of a later-discovered conflict. The parties will stop affected work while determining whether it can proceed lawfully, preserving evidence and observing court or professional obligations.

5. Materials, inspection and evidence

The client will identify relevant materials, deadlines and preservation duties. Document receipt, custody, condition, transfer and return of physical evidence. No destructive or materially altering test may occur without specific written authorization, an agreed protocol and required notice or court approval. Establish site access, safety responsibilities, equipment, photography and insurance before inspection. Do not discard evidence, communications, drafts or source data contrary to a legal hold or applicable duty.

6. Confidentiality and disclosure

Use matter information only for the engagement and share it only as authorized or lawfully required. Agree secure transfer and storage arrangements before receiving sensitive records. Counsel should address privilege, work product, expert disclosures, discoverability and protective orders; none is guaranteed by this template. The expert must comply with lawful process and applicable disclosure requirements. Protected reporting and nonwaivable rights are preserved.

7. Compensation and payment

Complete every applicable rate, retainer, expense, minimum and cancellation field. State what the retainer covers, when invoices are issued, when payment is due, how disputed items are handled and how unused funds are returned. Do not leave a nonrefundable charge or late fee implied. Any increase or extra work requires the agreed written authorization. Pay the expert directly. This agreement does not authorize WitnesSource to debit, hold or pay out expert funds.

8. Schedule, termination and work product

Document dependencies and realistic deadlines. Either party's cancellation or withdrawal must follow agreed notice terms and applicable court and professional duties. Address completed work, incurred authorized costs, unused retainers and transition of records. Specify ownership and permitted use of reports, background methods and supporting material; do not promise transfer of third-party or employer-owned rights. Required evidence preservation and disclosure continue after termination.

9. Risk terms and execution

The expert and client remain responsible for their own acts. Resolve appropriate insurance, indemnity, liability limits and dispute terms for the actual work with counsel; do not assume a standard clause covers injury, evidence loss or professional negligence. Identify governing law and a lawful forum before signature. Preserve mandatory rights and any legally protected disclosures, including applicable 18 USC 1833(b) trade-secret reporting protections. Signatures: expert representative, name/title/date; retaining client representative, name/title/date; payer acceptance if different.

Execution record

Party / authorized signer: _____
Signature: _____ Date: _____

Party / authorized signer: _____
Signature: _____ Date: _____

Final version / attachments: _____

Mutual Confidentiality & Information Handling Agreement

Agreement template - not executed | Version 2026-10-06

Define permitted recipients, information use and handling before sensitive material is exchanged.

TEMPLATE - NOT EXECUTED. Complete all material fields and obtain appropriate legal review and written acceptance before use. No signature or agreement is created by viewing this document.

Completion schedule

Full legal identities and notice contacts of the parties:

_____

Purpose, matter reference and permitted information categories:

_____

Authorized recipients and agreed transfer/storage methods:

_____

Effective date, duration and return/deletion procedure:

_____

Any protective order, legal hold, data processing or sector-specific addendum:

_____

1. Before disclosure

Complete and accept this agreement before disclosing protected information. Identify the parties that will actually receive it. A standard website form is not a secure case-file intake channel. This agreement alone does not establish HIPAA compliance, a business associate relationship, attorney-client privilege or authority to disclose records. Any necessary consent, protective order or sector-specific agreement must be addressed separately.

2. Protected information and exclusions

Protected information is nonpublic information disclosed for the specified purpose that is identified as confidential or reasonably understood to be confidential from its nature or circumstances. It excludes information the recipient can demonstrate was lawfully known without restriction, became public without breach, was independently developed without use of the disclosure, or was lawfully received from a third party without a duty of confidence.

3. Limited purpose and recipients

Use protected information only for the agreed purpose. Limit access to identified recipients who need it and are bound by suitable duties. Do not publish, trade on, repurpose for marketing, or upload it to an unrelated service or AI tool without specific authorization and an appropriate confidentiality/data arrangement. The discloser must have authority to share the information; no license beyond the agreed use is granted.

4. Care and incidents

Use reasonable safeguards appropriate to the information and the agreed handling plan. Promptly notify the other party of suspected unauthorized access, loss or disclosure affecting the information, cooperate in containment and preserve relevant records. The parties must assess any legally required notifications and who is responsible; this template does not replace statutory duties or guarantee security.

5. Legal obligations and protected reporting

A recipient may make a disclosure required by law, lawful process or court order. Where legally permitted, give timely notice and reasonable assistance so the discloser may seek protection, and disclose only what is required. Nothing prohibits reporting suspected violations to a regulator, law enforcement or an attorney, participating in an investigation, or exercising a protected right. Under 18 USC 1833(b), qualifying confidential reporting to officials or an attorney and qualifying sealed filings can be immune from trade-secret liability; retaliation plaintiffs may use the information with counsel and under seal subject to statutory conditions.

6. Return, retention and no guaranteed privilege

At the agreed end of use, return or delete information as specified, except for records required by law, a legal hold, professional duties or justified archival requirements. Explain any retained category and keep its protection in place. Do not destroy discoverable evidence. Disclosure to a referral business or expert does not automatically create privilege, and this agreement cannot override applicable discovery or court rules.

7. Completion and signatures

Agree the duration of duties, handling of trade secrets and personal data, lawful remedies, governing law and forum before signature. An injunction or other remedy remains subject to legal requirements and a court's decision. Neither party guarantees that every disclosure is complete or fit for a use beyond the stated purpose. Preserve nonwaivable rights. Signatures: each legal party's authorized representative, name/title/date. Attach the recipient list and handling plan.

Execution record

Party / authorized signer: _____
Signature: _____ Date: _____

Party / authorized signer: _____
Signature: _____ Date: _____

Final version / attachments: _____

Expert Profile & Marketing Consent

Consent template - not executed | Version 2026-10-06

Approve exact professional materials and the audiences and channels where they may appear.

TEMPLATE - NOT EXECUTED. Complete all material fields and obtain appropriate legal review and written acceptance before use. No signature or agreement is created by viewing this document.

Completion schedule

Expert legal name, business and contact:

_____

WitnesSource contracting legal person/entity:

_____

Approved biography/CV/photo/logo files and version/date:

_____

Allowed channels and audiences; excluded claims or uses:

_____

Approved public contact fields; consent date and expiration, if any:

_____

1. Specific approval

Attach or identify the exact final materials the expert approves. Select permitted channels individually: public WitnesSource profile; approved specialty pages; one-to-one professional introductions; other specifically described channels. Identify permitted audiences, such as attorneys, insurers, claims administrators or commercial organizations. Unselected channels and unpublished private material are not authorized. This consent is effective only when completed and accepted by the expert and WitnesSource.

2. Limited license

The expert grants a nonexclusive license to display and reproduce only the approved materials for the approved promotional purposes and period. The expert retains ownership and confirms the necessary permissions for supplied content. Formatting or cropping must not distort meaning; material factual changes, new claims, testimonials or broader uses require fresh approval. No transfer of employer-owned content or implied endorsement is authorized.

3. Accuracy and limits

Public statements must accurately describe qualifications, licenses, jurisdictions, consulting and testimony experience. Do not state availability, court qualification, certification or past outcomes without support and approval. Do not publish client identities, case details or confidential information without separate lawful authority. Approval of promotion does not complete credential screening, authorize regulated work or guarantee assignments.

4. Optional contact and withdrawal

Specify which business contact details may be public. The expert may request correction or withdrawal of future promotional use in writing. WitnesSource will stop new use and remove controlled public materials within a reasonable period, subject to required records and existing lawful obligations. Previously delivered communications, third-party copies and search caches cannot always be recalled. Withdrawal does not cancel a separately accepted professional engagement.

5. Independence and confirmation

No payment for approval or positive testimony is required. Editorial purchases and future paid enhancements do not change screening or client suitability decisions. Confirm the approved attachment list and channels before signing. Expert signature/name/date; WitnesSource authorized representative/name/date. A submitted application or general expression of interest does not substitute for this completed approval.

Execution record

Party / authorized signer: _____
Signature: _____ Date: _____

Party / authorized signer: _____
Signature: _____ Date: _____

Final version / attachments: _____

Optional Services Order & Delivery Agreement

Agreement template - not executed | Version 2026-10-06

Confirm editorial projects, the Organizer or a future activated profile service before payment.

TEMPLATE - NOT EXECUTED. Complete all material fields and obtain appropriate legal review and written acceptance before use. No signature or agreement is created by viewing this document.

Completion schedule

WS-S reference; seller legal identity; customer legal name and email:

_____

Selected service and exact deliverables/version:

_____

Price/currency and any applicable taxes; payment method and due date:

_____

Start date, delivery date and customer dependencies:

_____

Revision scope, approval and acceptance procedure:

_____

Cancellation/refund terms before and after work starts; remedies for nondelivery:

_____

Use license, confidential material restrictions and support contact:

_____

1. Order formation

A request is not an order. Complete the schedule, identify the legal parties and obtain their written acceptance before work or payment. Price, scope and delivery commitments need WitnesSource's authorized approval. A checkout link alone does not complete the schedule. This template does not automatically activate a plan or authorize recurring charges.

2. Editorial preparation

For a CV or profile project, identify supplied files, length, format, revisions and due dates. The customer is responsible for accurate, authorized source information. WitnesSource will not invent qualifications, employment, publications, testimony or results. The customer reviews factual statements and approves final content. Purchase of writing assistance does not assure a public listing, qualification review outcome, leads or an engagement.

3. Practice Organizer

If ordered, identify the version of the $150 USD one-time Expert Practice Organizer and agreed delivery timing. It contains original organizational worksheets and a publication approval checklist. It is not an attorney-drafted engagement contract, accredited training or a guarantee of professional compliance. State the personal practice-use license and any sharing restrictions in the schedule. No automatic subscription accompanies it.

4. Profile enhancements

Profile plans remain prelaunch until specifically offered and accepted for activation. Any future order must identify the reviewed experts covered, presentation features, publication approval, service period, price, update process and cancellation treatment. Basic approved profiles remain free. No automatic renewal or guaranteed audience is established by this template.

5. Payment and fulfillment

Use the confirmed order reference at the agreed hosted Stripe/PayPal checkout or order-specific invoice. The seller must verify the actual provider transaction before marking paid or delivering a paid pack. Do not collect card details through email or an inquiry form. State delivery method, completion criteria and how a missing or defective deliverable will be resolved. A browser return page is not proof of payment.

6. Cancellation, content rights and responsibility

Agree cancellation and refund terms before acceptance, including unstarted work, partially completed authorized work, missed delivery and any unused service period. Preserve mandatory rights. Define the customer's use rights in final deliverables and any preexisting or third-party materials. Neither party may publish the other's confidential records without authority. Each remains responsible for its own conduct; any negotiated liability or dispute provision requires express written agreement.

7. Acceptance

No work starts with unresolved material fields. Changes in scope, timing or price require written acceptance. Keep the completed schedule, attachments, acceptance date and authorized signers with the WS-S reference. Signatures: seller representative/name/title/date; customer representative/name/title/date. This agreement covers optional WitnesSource services, not independent expert retainers or professional invoices.

Execution record

Party / authorized signer: _____
Signature: _____ Date: _____

Party / authorized signer: _____
Signature: _____ Date: _____

Final version / attachments: _____

Sponsorship & Advertising Order

Prelaunch agreement template - not executed | Version 2026-10-06

Specify a real placement, documented audience and clear advertising identification before any sale.

TEMPLATE - NOT EXECUTED. Complete all material fields and obtain appropriate legal review and written acceptance before use. No signature or agreement is created by viewing this document.

Completion schedule

Seller and sponsor legal identities, authorized signers and notice contacts:

_____

Placement, publication/channel, date and duration:

_____

Verified audience description and measurement date; reporting limits:

_____

Approved creative, destination URL, deadline and revision process:

_____

Agreed price, payment and cancellation/refund or make-good terms:

_____

1. Availability and formation

WitnesSource sponsorship is prelaunch interest only. No newsletter audience, campaign inventory or placement is promised by this template. Use it only after an actual placement and delivery capacity are confirmed and the completed order is accepted. Indicative prices of $99 for a newsletter issue and $149 for a resource-page placement do not themselves create an order.

2. Placement and disclosure

Identify the exact location, size or format, start/end dates and the prominent advertising or sponsorship label. Supply actual audience evidence with its date and limitations before agreement. Do not promise reach, clicks, leads or engagements without a separately supported commitment. Paid links must be appropriately identified for readers and search engines.

3. Content rights and review

The sponsor supplies accurate, substantiated and authorized copy and creative, with rights to all trademarks and images. WitnesSource may decline misleading, unsafe, infringing or unsuitable material. Material changes require sponsor approval. The order does not permit use of an expert's name, photo or endorsement without that person's specific consent, and does not transfer a customer or applicant list to the sponsor.

4. Independence and fulfillment

Sponsorship does not buy credential approval, a suitability recommendation, preferential access to confidential inquiries or a favorable professional opinion. Define reporting that the actual systems can deliver, deadlines and a remedy for missed or materially different placement. Do not report unverified impressions or conversions as results.

5. Payment, cancellation and claims

Agree the final price, due date and cancellation/refund or replacement-placement rules in writing before acceptance. No automatic renewal or continued charge is authorized. Each party is responsible for its own supplied content and conduct. Any indemnity, liability limit or dispute provision must be expressly reviewed and included in the signed order; mandatory legal rights remain unaffected.

6. Acceptance

Complete all fields and attach the final approved creative and audience evidence. Identify legal parties and authority. Signatures: seller authorized representative/name/title/date; sponsor authorized representative/name/title/date. No payment is due merely for registering sponsorship interest.

Execution record

Party / authorized signer: _____
Signature: _____ Date: _____

Party / authorized signer: _____
Signature: _____ Date: _____

Final version / attachments: _____