

Longitudinal Premed Mentorship Client Agreement Packet

Draft 0.1 for review

October 30, 2026

This packet identifies the service, payment obligations, delivery limits, cancellation rules and information handling for one adult advising engagement. Complete the Enrollment Schedule and read all documents before acceptance.

Key terms before signing

\$395 per month with a three-calendar-month minimum of \$1,185 after service begins. The first payment is due before kickoff. Each month after the minimum requires affirmative renewal and payment.

One 45-minute monthly meeting, a maintained 90-day plan updated monthly, in-scope written advice and one single-pass planning-document review up to 1,500 words per three-billing-month service quarter. Essay editing and application-package work are excluded.

Cancellation before kickoff and agreed advising commencement refunds payments without preparation deductions and cancels future minimum payments. Ordinary voluntary cancellation after service begins preserves the minimum and available paid service. Hardship release, payment pause, advisor inability and missing-output protections have separate rules.

Replies to in-scope questions are due within two business days. The Service Terms define preparation, review and delivery deadlines. All clocks use the stated Eastern Time and Day 0 conventions.

No automatic card charges, interest, installment surcharge or late fees apply. An owed refund requires funded submission and Client confirmation within three business days of the applicable trigger. Bank posting is separate.

This is adult educational advising, with no guaranteed admission or score outcome. Client-record review is manual, and external AI processing of those records is disabled. A payer has no automatic access to advising information.

These highlights help you review the complete packet. They do not replace its Service Terms, Scope or Privacy Notice. Read all applicable documents and ask questions before accepting. Mandatory legal rights remain unaffected.

Enrollment Schedule

Complete every applicable field before acceptance. This Schedule selects one service and identifies the documents incorporated into the agreement.

Selected service: Longitudinal Premed Mentorship

Packet ID: CME-MENTORSHIP-0.1-20261030. Client engagement ID:

Client legal name: _____

Client notice email: _____

Client state and country of residence: _____

Client confirms age 18 or older: Yes / No

Company: CHARTERED MEDICAL EDUCATION LLC, a Florida limited liability company

Assigned advisor: Omar Jean-Baptiste, MD, MSCR

Company notice and privacy email: hello@charteredmeded.com

Business phone: (813) 768-4058

Company fallback notice method and destination: _____

Client fallback notice method and destination: _____

Notice and fallback delivery verification dates: _____

Payment provider and method shown on invoice: _____

Payer if different from Client and permitted billing contact: _____

Any separate Client authorization for payer or advisor access: None / attached authorization
identified here _____

Meeting format and scheduling channel: _____

Private record submission and written-advising channel: _____

Actual hosting storage submission and payment providers with account and handling terms:

Agreed Client prerequisites and exact due dates: _____

Monthly fee: \$395. Initial three-calendar-month commitment: \$1,185

Actual kickoff and advising commencement date: _____

First three billing months with inclusive start and exclusive next-anniversary dates:

Initial minimum end date: _____

First three payment amounts dates and Eastern Time cutoffs: _____

Initial action-plan delivery date: _____

Recurring monthly-update deadline: _____

First service-quarter start and end, and quarterly-review request cutoff: _____

Monthly meeting scheduling and any agreed exception: _____

External AI processing of client records: Disabled. Manual review only. No AI consent collected

Optional academic-profile statistics: Allow / Exclude. A blank means Exclude

Academic-file end trigger and scheduled 90-day deletion date, updated at closeout:

Final-work and minimal-note purpose and retention date, no later than 12 months after completed engagement: _____

Agreement and financial-record retention triggers and dates: _____

Completed-copy delivery email or other retainable channel: _____

Packet register

This packet contains the Enrollment Schedule, Core Agreement, Longitudinal Premed Mentorship Service Terms, Longitudinal Premed Mentorship Service Scope and Client Privacy Notice. Every component is Draft 0.1 dated October 30, 2026. Packet ID CME-MENTORSHIP-0.1-20261030 identifies this version. Identify any expressly agreed amendment or additional authorization below. No unrelated service scope is incorporated.

Additional agreed documents and versions, or None: _____

Core Agreement

The parties and the agreement

CHARTERED MEDICAL EDUCATION LLC, a Florida limited liability company, is the Company and Advisor under this agreement. The adult named in the completed Enrollment Schedule is the Client. The Company provides the service, issues invoices, receives fees and is

responsible for service and refund obligations. Omar Jean-Baptiste, MD, MSCR is the assigned advisor. The authorized representative signs for the Company.

This packet governs one selected advising engagement. The completed Enrollment Schedule, Core Agreement, selected Service Terms, selected Service Scope and Client Privacy Notice identified in the packet register are part of the agreement. Both parties shall receive the same complete, retainable accepted packet. A public webpage or later webpage change does not replace an attached version. A later change affecting either party's duties or rights requires their written agreement.

The parties shall complete the service, total fee, payment dates, service dates, document versions, notice destinations and applicable delivery fields before accepting the packet. An inquiry or free fit call does not enroll the Client, reserve a place or start personalized work. Enrollment begins after fit and availability are confirmed, both parties accept the completed packet and the first required payment is received.

Educational advising and client responsibilities

Advising supports the Client's educational planning and preparation. It is not medical care and does not establish a physician-patient relationship. Admission, interviews, scores, scholarships and other outcomes are not guaranteed. Institutional affiliations describe experience and do not imply endorsement or admissions influence.

The Client supplies accurate information, completes agreed intake, writes and revises their own application materials, observes each school's requirements and makes all final submission decisions. The Advisor provides feedback rather than ghostwriting, accessing the Client's application account or submitting materials. No confidential admissions information or

fabricated experiences will be used. School restrictions on updates, assistance, AI use and length take precedence.

The Client confirms that they are at least 18 years old. A parent or other payer receives no advising information or authority to make the Client's decisions merely by paying. Any permission to share advising information must be separately specified by the Client.

Meetings written support and delivery clocks

Meetings and reviews have the limits in the selected Service Scope. Unlimited written advising means unlimited questions within that scope and support period. It does not add meetings, document reviews, services or emergency availability. Replies are due within two business days. The selected Service Terms and Service Scope state the deadlines for deliverables and document reviews.

For every two- or three-business-day delivery, reply, review or refund duty, the date of receipt or the triggering event is Day 0. Performance is due by 11:59 p.m. Eastern Time on the second or third following business day, as applicable. Business days exclude Saturdays, Sundays and observed US federal holidays. Calendar-day and 24-elapsed-hour periods remain separate. A stated exact calendar date and Eastern Time cutoff controls the applicable notice or service window. A complete, eligible submission received by a service cutoff remains timely even when its reply or feedback is due afterward.

Work beyond the purchased scope requires a separate written description and price agreed before that work begins. Additional work is subject to availability.

Payments and third party payers

The Enrollment Schedule states the total price, required payments, actual due dates and Eastern Time cutoffs. Payment is made to the Company through the agreed provider and method shown on its invoice. The service-specific payment and renewal provisions govern. There are no automatic card charges, installment surcharges, interest or late fees.

Payment collected in advance is not automatically earned. On voluntary cancellation, stop undelivered work and apply the selected service's earning and refund rules. Completed work is not repriced at an invented hourly rate or cancellation penalty. Advisor inability is governed by its separate remedy.

If another person pays for the Client, payment alone does not make that person a client, guarantor or party to this agreement. The Client's payment obligations remain those stated in this agreement. Record the payer and permitted billing contact in the Enrollment Schedule. Advising records and detailed service-settlement statements go to the Client unless the Client separately authorizes sharing or disclosure is legally required. The payer may receive payment-processing records necessary to make or refund their payment. Refunds ordinarily return through the original payment route. The Company does not promise that a refund to another person's payment method will instead be paid to the Client.

Cancellation and refund processing

The Client may cancel through the contract-notice email or agreed fallback in the Enrollment Schedule. Cancellation is effective on receipt, without a reading, acknowledgement, internal approval or prior-payment requirement. It starts any applicable refund clock. Service-specific minimum commitments, available-paid-month continuation and remedies still govern.

Cancellation does not by itself convert voluntary withdrawal into Advisor inability.

The Advisor shall submit an owed refund through the original payment route, with sufficient available funds, and send the Client confirmation of the amount and submission within three business days after the event creating entitlement under the applicable refund rule. For an eligible client-cancellation rule, the event is receipt of cancellation. The Service Terms identify other triggers. Internal review, calculation or acknowledgement does not restart the clock. Any mandatory shorter deadline takes precedence.

Refund submission is distinct from payment-provider processing and bank posting. Their completion time is not guaranteed by this deadline. The Advisor shall monitor pending or failed refunds, notify the Client promptly of a problem and arrange resolution, including a secure alternative if the original refund fails. A pending refund caused by insufficient Advisor funds is not bank-posting delay. Consumer rights remain unaffected.

Net payments means payments actually received less prior refunds and returned payments. Use cumulative adjusted earned fees so a payment, charge removal or refund is not counted twice.

Record funded refunds already submitted but still processing and do not submit them twice. A failed refund remains outstanding and is not treated as completed merely because a request was attempted. Cash refunds cannot exceed actual net payments held for the engagement. A removed unpaid charge is not a cash refund. Any service-specific pending-unit reserve applies only while the corresponding work remains expressly owed and does not postpone an earlier cancellation or provider-failure refund.

Privacy and manual review

The attached Client Privacy Notice describes the selected service's information handling and retention. The Company collects only relevant redacted academic and application materials through the confirmed private channel and stated providers. Omar is the sole human advisor

initially. Service providers may process information under their disclosed terms. Parents, payers and future assistants have no automatic access. No routine meeting recording is used.

External AI processing of client records is disabled. This packet does not collect an AI opt-in or authorize transmission of client records to an AI service. Any future use requires verified controls, an updated specific disclosure and separate express permission. Declined or blank consent means manual review at the same purchased scope and fee. School restrictions continue to apply. The Client Privacy Notice contains the retained limits on any proposed future use.

Optional academic-profile statistics are excluded unless the Client affirmatively chooses them in the Enrollment Schedule. Essential operational and payment records remain. Separate permission is required for testimonials, photos and public application examples. No client-derived external dataset publication, licensing or sale is authorized.

Notices and governing law

Cancellation and other contractual notices use hello@charteredmeded.com for the Company and the Client notice email in the Enrollment Schedule, or the expressly agreed fallback destination recorded there. Privacy requests also use hello@charteredmeded.com. The parties shall verify these destinations before enrollment and agree any changes in writing.

A notice is received when it enters the designated retrievable system in a processable form. Human reading or acknowledgement is not required. A message known to have bounced, been rejected or otherwise failed delivery is not effective notice. The sender shall use the agreed fallback within one business day after learning of the failure. A failed nonpayment notice does not start a cure period. Reissue it with an exact cutoff at least 14 calendar days after effective delivery. Failure of delivery does not erase an earlier effective cancellation or refund entitlement. No third-party contact is authorized merely because delivery fails.

Florida law governs, subject to applicable rights and consumer protections that cannot be waived. This provision does not choose an exclusive court or remove mandatory protections elsewhere. No mandatory arbitration, class-action waiver, jury-trial waiver, liability waiver or damages cap is included.

The parties agree to electronic records and signatures for this engagement. Each shall receive a completed retainable copy of the agreement and all incorporated documents. Record the actual acceptance dates separately from the service start date. The acceptance page identifies the exact packet and document versions. The Company shall deliver the completed copy to the Client's agreed email or other agreed retainable delivery channel.

Longitudinal Premed Mentorship Service Terms

Monthly fee invoices and billing month dates

Mentorship is \$395 per billing month with the three-month minimum, totaling \$1,185. Invoice monthly without automatic card charges. The first payment is due before kickoff. Send subsequent invoices seven calendar days before the next billing month, with payment due before that month begins. Billing months run from the kickoff date's monthly anniversary to the day before the next anniversary. If that date does not exist in a month, use its final calendar day. Subsequent months return to the original anniversary date.

Initial minimum commitment

During the minimum, cancellation prevents continuation after month three. Remaining minimum payments are due and service remains available through the paid commitment, subject to the nonpayment rule below. The advisor may agree in writing to release remaining minimum payments for financial hardship. Release is not automatic.

Written hardship release

A written hardship release forgives only the specified future payments. It does not automatically refund previously completed, paid months. This hardship release alone does not settle current-month refunds. The separate started-paid-month voluntary-cancellation rule applies when the Advisor remains available. Advisor inability remains separate.

Affirmative renewal after month three

After month three, each further month requires affirmative renewal and payment. A client may decline the next renewal by email without a cancellation fee.

Nonpayment pause and cure notice

If payment is overdue, pause new meetings, reviews and written advising. Keep access to the Client's uploads, delivered work and receipts under the existing retention rules. A pause does not authorize deletion or a blanket file lockout. During a full pause the \$245 nonmeeting portion earns \$0 for paused dates. Previously earned fees remain earned. A pause alone does not immediately waive the minimum commitment, refund cash, extend a billing month, or count an unheld meeting as delivered.

Send the written nonpayment notice with the overdue amount, payment instructions and an exact Eastern Time cutoff at least 14 calendar days after effective delivery under the notice provision.

If unpaid after that cutoff, the Advisor may end service by a separate written closeout.

Termination is not automatic. No additional minimum-month invoices fall due while the full pause continues. Record their conditional treatment in the closeout or agreed restart plan.

Written nonpayment closeout and settlement

Upon actual written nonpayment closeout, release unprovided future months and any unearned portion of the interrupted minimum commitment. This is an express closeout release, distinct from a pause alone and from the separate discretionary hardship release. Retain only \$150 for a completed meeting in the affected month plus \$245 multiplied by fully available completed date units divided by that actual billing month's date units.

Use Eastern Time, the original monthly anniversary boundaries, exclude unavailable dates and the unfinished cutoff date, and round the final aggregate settlement once to cents, half a cent up.

An unheld or unfinished meeting earns \$0, even if a missed appointment used its allowance.

Earlier completed months are not automatically refunded. Refund any positive excess of that month's payments over earned fees. State any earned-but-unpaid balance in an itemized closeout, due 30 calendar days after delivery, with invoice-error review and discretion to extend, reduce or waive it in writing.

Do not accelerate future payments, impose late fees, charge a card automatically or authorize outside collection. Submit any funded refund and client confirmation within three business days after the closeout entitlement arises. Calculation or acknowledgement does not restart that clock.

Restart before written closeout

If payment is cured before closeout, confirm a feasible restart date and schedule in writing.

Preserve the original billing anniversaries and original minimum end date unless both parties expressly agree otherwise. Three calendar months are not 90 days. Reconcile paused-date support credits using \$245 times excluded dates divided by actual dates in the affected month.

Do not charge \$150 for a fully paused month with no completed meeting. Credit these

unavailable-service amounts against the restart invoice, or refund any resulting overpayment within three business days of the agreed reconciliation.

Do not retain an unearned credit indefinitely after service ends. Restore the current month's unused meeting opportunity where a workable date remains, subject to the missed-appointment rule. Expired paused-month allowances do not accumulate or earn a fee. No automatic extra meetings, retroactive support charge, new minimum, restart fee or endpoint extension applies. If the Advisor cannot offer the promised remaining service, use the separate Advisor-inability replacement-or-refund rule rather than requiring payment for unavailable service.

New engagement after written closeout

After actual closeout, a new engagement requires a new written agreement that reconciles earlier payments, work and refunds without charging twice.

Cancellation during a full payment pause

A Client cancellation received during a full payment pause creates an immediate closeout under these rules, without waiting for the cure period or acknowledgement. Normal voluntary cancellation while the Advisor remains available still follows the paid-month rule and three-month commitment. A hardship release forgives only the specified future payments.

Before service begins and prepaid optional renewals

The ordinary three-calendar-month minimum begins at actual kickoff/advising commencement, not merely signing or preparation. State the actual start in the Enrollment Schedule. No personalized advising starts earlier without written agreement. If the Client cancels before kickoff and before agreed advising begins, cancel future minimum payments and refund all

payments received, without preparation, onboarding or administrative deductions. Submit the funded refund and client confirmation within three business days after receipt of cancellation.

After service begins, voluntary cancellation while the Advisor remains available preserves the ordinary minimum and remaining service availability. An optional renewal month beyond the minimum that is prepaid but has not started when cancellation is received does not renew and is refunded in full within the same three-business-day deadline.

Written release of prepaid unstarted months

A hardship release shall identify the future obligations forgiven and whether specific prepaid unstarted months are included in a cash refund. State those amounts and refund triggers. It does not automatically refund completed or currently started months. Refund any expressly released prepaid unstarted amount within three business days after that release takes effect.

Mandatory month end and endpoint pause reconciliation

At the end of each affected billing month, and no later than the original minimum/service endpoint, reconcile the account even if neither restart nor written closeout has occurred. Paused support dates earn \$0. Use the actual-month \$245 nonmeeting fraction and \$150 only for a completed meeting. Refund any net unearned prepaid amount, capped at actual payments received, with funded submission and client confirmation within three business days of that month-end/endpoint trigger. Do not hold an unearned credit indefinitely or reset an earlier refund entitlement.

An unheld or unfinished meeting earns \$0 in this pause reconciliation, including when an allowance was consumed. No duplicate credit or cash refund exceeding payments received applies. This is distinct from voluntary cancellation of an otherwise available started paid month. Earlier earned unpaid fees follow the existing notice/closeout rules, without resetting a cure

deadline. No automatic carryover, new minimum or extension results from reconciliation.

Advisor-caused loss of a promised meeting remains subject to replacement or the Advisor-inability refund rule.

Client-caused pause does not automatically create extra meetings.

Nonmeeting component and promised outputs

The \$245 monthly nonmeeting component covers written advice, the rolling action plan and monthly updates, and any eligible quarterly light review. Message availability alone does not establish completion of promised outputs. The specific nonmeeting-output protection in this Mentorship addendum also applies to pause and month-end settlements.

Action plan monthly updates and quarterly review

A service quarter is three consecutive billing months beginning at actual kickoff and each subsequent three-month anniversary. One light review may be requested during active paid service within that quarter. Unused allowances do not accumulate. A complete eligible draft received before the quarter or engagement cutoff is returned within three business days even if that date falls afterward. The initial action-plan delivery date and recurring monthly-update deadline shall be stated in the Enrollment Schedule before enrollment. Client prerequisites and their dates shall be identified in advance.

A missing prerequisite does not permit an undisclosed retrospective deadline change. The Advisor shall promptly identify a missing prerequisite and agree a feasible date in writing.

Meeting notice and missed appointments

At least 24 elapsed hours' written notice through the contract-notice channel in the Enrollment Schedule preserves the monthly meeting allowance. Exactly 24 hours is timely, weekends count

and Eastern Time applies. Reschedule at a mutually agreed date within the billing month where reasonably available. A cancellation with less notice or a no-show uses that month's reserved meeting allowance, without an extra fee or an automatic refund solely for the missed slot. Ongoing in-scope written advising remains available. The Advisor may grant a written replacement exception for unexpected illness or emergency.

A missed slot is reserved capacity, not a completed consultation. If the Advisor cancels or cannot offer reasonable replacement availability, preserve the Client's meeting and provide a replacement, including beyond the billing month if needed. This rule does not decide early termination, provider-failure refunds, or the effects of nonpayment pauses.

Voluntary cancellation during an available started paid month

No automatic refund arises solely because the Client voluntarily cancels during an already-started, paid billing month while the Advisor remains able and available to provide the promised services. Keep all remaining included meeting rights and in-scope written advising available through that actual billing month's end, subject to the appointment rules. The parties may agree a different adjustment in writing. Preserve the initial three-month commitment unless specifically released in writing. Later optional months require affirmative renewal and payment.

This does not determine remedies for Advisor inability, nonpayment pauses or prepaid months that have not started.

Advisor inability to provide remaining services

If the Advisor cannot provide the remaining promised Mentorship service, notify the Client promptly and identify the undelivered service. The Advisor may offer a specific replacement or revised schedule at no additional fee, effective only by mutual agreement. The Client need not accept substitute service or an extension. If no workable alternative is offered or the Client

declines it, refund the undelivered portion of payments received and release future payments for services the Advisor cannot provide, including payments otherwise within the three-month minimum. Privacy and record-handling duties continue.

Partial month refund following Advisor inability

Allocate the \$395 monthly fee as \$150 for the completed 45-minute meeting and \$245 for the nonmeeting component described in this Mentorship addendum. These are included refund-accounting allocations, not extra charges or measured costs. A meeting that was not completed earns \$0, with no preparation or partial-meeting deduction. Earned support = \$245 multiplied by fully available completed calendar-date units divided by the actual calendar-date units in that agreed billing month. Use Eastern Time and the actual billing-month start inclusive and next anniversary exclusive, not an assumed 30 days.

Exclude dates on which promised support was unavailable and the unfinished cutoff date. Client silence and ordinary weekends or holidays under the agreed two-business-day reply standard do not alone make support unavailable. Do not count unavailable time merely because notice was delayed. $\text{Refund} = \max(0, \text{net payments allocated to that month minus the completed-meeting allocation minus earned support})$, capped at those net payments. Round the final aggregate refund once to the nearest cent, half a cent up.

With \$395 paid, 10 available days in an actual 30-day billing month yield a \$163.33 refund if the meeting was completed, or \$313.33 if it was not. This allocation applies to the Advisor-inability remedy when no replacement arrangement is agreed. It does not change the separate voluntary-cancellation rule. Future unavailable-service payments remain released under the rule. The funded refund-submission and client-confirmation deadline remains three business days, separate from bank posting. This formula does not waive other applicable remedies.

Nonmeeting output protection

If the Advisor cannot deliver a required action plan, monthly update or timely requested eligible quarterly review by its deadline, the Advisor shall promptly identify that output and offer any specific workable replacement date without extra charge. The Client need not accept it. The protection is triggered on the earliest of the Client's refusal of a proposed replacement, the Advisor's notification that no workable replacement is available, or the end of the second business day after the original delivery deadline if the output remains undelivered and no specific replacement date has been mutually accepted.

An offer alone does not extend a deadline or require a Client reply. Advisor silence does not postpone the trigger. Preserve any earlier time-critical refund entitlement. At that trigger, the affected billing month's entire \$245 nonmeeting component is unearned: remove its unpaid charge or refund its paid amount, less prior refunds or credits for that same component, without duplicate adjustment. The undelivered output ends unless the parties separately agree continued delivery without charging again for the refunded component. For a plan or update, use the billing month to which that output relates.

For a quarterly review, use the active paid billing month when the complete eligible draft was received. A single output does not generate the same \$245 adjustment for multiple months, and multiple affected outputs in one month do not exceed that month's \$245 component. The Advisor may retain \$150 only for a completed meeting, subject to other applicable remedies. Any cash refund is limited to actual payments remaining after prior refunds and is submitted with sufficient funds and Client confirmation within three business days after the earliest trigger above.

In a pause or partial-month calculation, reduce the nonmeeting earnings to \$0 for the affected month under this protection and count earlier support credits/refunds only once. This protection does not arise merely from unused available service, a missing Client prerequisite, or an isolated late reply. Those matters remain subject to the other duties and remedies. Nothing in this allocation waives other applicable legal rights.

Longitudinal Premed Mentorship Service Scope

Longitudinal Premed Mentorship

Ongoing strategy and accountability for early-to-mid-stage premed students, typically at least six months before substantial application writing. Price: \$395 per month, with a three-month minimum (\$1,185 initial minimum commitment), then month-to-month.

What you receive

One 45-minute advising session per month.

A maintained rolling 90-day action plan with priorities updated monthly. The initial delivery date and recurring monthly-update deadline are recorded in the completed Enrollment Schedule.

Guidance on sequencing academics, MCAT preparation, clinical exposure, service, research, leadership, gap years, and application timing. Early recommender planning helps you identify people who can observe your work and develop meaningful professional relationships over time. Research and other activities should reflect your genuine interests and available time.

Unlimited written check-ins, questions, and follow-up advice within the Mentorship service throughout active paid membership, answered within two business days.

One light review per service quarter of a CV, activity tracker or similar planning document: one pass, up to 1,500 words. A service quarter is three consecutive billing months beginning at

kickoff and each subsequent three-month anniversary. Request it during active paid service.

Unused allowances do not accumulate. A complete eligible draft received before the applicable cutoff is reviewed within three business days, even if feedback is due afterward. The \$245 nonmeeting component covers advice, planning, updates and an eligible review.

The agreement's nonmeeting-output protection applies if the Advisor ultimately cannot deliver a required output and no replacement is accepted.

What the service does not include

Mentorship is strategy and accountability. It does not include personal-statement or secondary-essay editing, a formal customized school list, an application submission audit, mock interviews, tutoring, or detailed research-project work. The quarterly document review does not include iterative essay editing or additional application deliverables.

Research guidance does not include executing a research project, completing analyses, writing manuscripts, or obtaining a research position for you.

How the engagement works

The initial commitment is three months, followed by monthly renewal. Billing and cancellation details will be specified in the client agreement before enrollment.

Use the monthly session within its billing month. Unused sessions do not accumulate. Advisor-initiated scheduling changes receive an appropriate replacement slot.

The student is the focus of the engagement. Separate parent or family meetings require an expressly agreed scope. They are not an included recurring meeting.

When your needs change

As substantial medical-school application writing begins, Medical School Application Coaching is the appropriate service for that work. Application editing is not absorbed into the monthly mentorship scope.

Client Privacy Notice

Version 0.1 dated October 30, 2026

Who handles your information

CHARTERED MEDICAL EDUCATION LLC provides the selected service, with Omar Jean-Baptiste as the assigned advisor. This notice applies to the service identified in your Enrollment Schedule and is part of your agreement packet. Contact hello@charteredmeded.com for privacy questions, corrections, access or deletion requests. Paid services under this packet are for adults aged 18 or older.

What we collect and why

We collect contact details and application goals, relevant course-level academic history, available GPA values labeled by source, scored MCAT attempts and plans, activities and completed or projected hours, meaningful contributions, recommendation relationships, school plans and prior-cycle results. We collect only what is needed for your selected service. Optional writing is read only when useful for that service. You can reuse documents instead of repeating their contents.

For this Mentorship, we use relevant information and agreed updates to maintain the action plan, prepare monthly meetings and provide in-scope advice.

Provide relevant redacted pages rather than an entire primary-application PDF by default.

Unofficial transcripts should retain courses, terms, credits and grades while omitting unnecessary IDs, birth dates, addresses and other identifying fields. We do not request portal passwords, Social Security numbers, payment-card numbers, patient-identifying information or confidential recommendation letters. Sensitive conduct, eligibility, health or family concerns can be flagged for private discussion without a written account or case documents. We keep only notes needed for your plan. Do not submit another person's confidential information.

Access and service providers

Omar is the sole human advisor initially. Additional advisors, assistants, parents and payers have no automatic access to your advising records. Their access requires your separate authorization or an applicable legal requirement. Disclosed storage, submission and payment providers may process information through authorized personnel under their applicable terms and safeguards. Owner-only advising access does not mean that no provider processes data.

The Company shall disclose the actual hosting, storage, submission and payment providers, account and handling terms in the Enrollment Schedule before collecting your records. It shall verify the access and handling configuration before collection. Where the agreed channel uses Google Forms and Google Drive, file uploads require Google sign-in. Google records the uploader's account name, email and photo when files and the form are submitted, and may process stored information to provide its services under its terms.

For the agreed Google intake, the Company shall disable draft autosave, public response summaries and response editing, restrict form responses and upload folders to Omar, and verify the selected service's access and deletion workflow before collecting records. An earlier service's configuration does not establish that a new channel is ready. Your Schedule identifies the actual

channel and account. Contact hello@charteredmeded.com before sending records if you need a private alternative.

Sensitive records belong in the confirmed private submission channel, not the public inquiry form. Payment-card information must not be entered in intake. The payment service and method will be identified separately on the Schedule and invoice. No automatic meeting recording or transcription is used.

Manual review and AI processing

Omar manually reviews your submitted materials. External AI processing of client records is disabled. This packet does not collect permission to send your records to Gemini or another AI service. AI may assist generic tasks or public-source research without receiving your records.

The same purchased scope and fee apply to manual review.

Before any future use of client information with an external AI service, the Company must verify the specific product, account, privacy settings and record-handling workflow. For the previously contemplated Gemini web-app route, history-off and a fictional-data workflow must first be verified. Technical verification alone does not authorize processing. You must receive an updated dated disclosure identifying the exact product and account, purpose, necessary redacted data categories and provider storage and deletion limits, followed by a separate opportunity to expressly opt in.

Any such future assistance remains limited to organizing academic and activity facts, drafting Omar's advisor roadmap and triaging follow-up questions, with Omar reviewing every client-facing answer. There are no full-file uploads by default, sensitive disclosures, essay ghostwriting, automatic replies or blanket personal-account, CLI or API authorization. Declining or leaving

consent blank means manual review at the same scope and fee. Withdrawal stops future processing. School restrictions and your application authorship remain protected.

Internal business statistics

Operational totals, such as service purchases, fees and delivery time, help run the business.

Academic-profile statistics are optional. Broad client-stage and GPA or MCAT categories may be combined into internal group totals to understand demand and improve services. Declining does not change your purchased service. A blank preference means exclusion from optional academic-profile statistics.

Longer-lived group summaries exclude names, client IDs and linkage keys, exact course histories and scores, essays, recommender details and sensitive personal narratives. Temporary client-linked inputs follow the personal-record schedule. We merge or withhold small or rare groups and avoid combinations that could identify someone. A coded row or identifying aggregate remains personal information. We retain non-identifying internal statistics only while useful for the stated purpose, with annual review.

When genuinely non-identifying totals no longer have a client link, an individual contribution may not be retrievable for removal. Exclude or change your preference before aggregation or ask about available options. No client-derived dataset release, external publication, licensing or sale is authorized. A future external-use plan requires a separate purpose and recipient decision, re-identification assessment, current legal and provider review, and appropriate notice and permissions before transfer. This notice is not blanket permission for unknown future uses.

Academic records and advising notes

Delete raw uploads, transcripts, applicant drafts and intermediate working copies 90 days after the selected engagement fully ends, including its question window and any timely replies or

reviews still owed. Use actual completion or termination plus resolution of previously owed work. Record the actual trigger and deletion dates in the Schedule or closeout.

Keep final roadmaps and timelines, final feedback summaries and minimal advising notes for up to 12 months after completed engagement where returning-client continuity remains a stated purpose. Delete earlier when that purpose ends. A genuinely new service requires a documented continuing purpose, updated notice and specific schedule. It does not silently restart older records' retention clocks.

A full payment pause does not prevent access to or export of your uploads, delivered work and receipts under these schedules. Previously owed work is resolved when delivered or expressly ended under the applicable cancellation or refund provision. The Company shall record that date and shall not keep an engagement open solely because an output is overdue. A continuing refund issue or dispute uses the separate minimal-evidence and hold rules and does not automatically extend the entire academic-file retention period.

Agreement and financial records

Retain agreements, attached scopes, amendments and minimal acceptance and closeout evidence for seven years after the later of service completion or termination and final payment or refund settlement. Retain invoices, receipts, refund records, expense records, bank and payment-processor statements and accounting ledgers for seven years after the latest of the relevant tax return's filing date, applicable due date or tax-payment date. A record serving both purposes uses the later deadline.

Preserve only relevant records longer when a documented dispute, audit, legal hold or longer applicable requirement applies. Release a hold only after checking remaining requirements. Later returns or amended claims, nonfiled returns and property or basis records require a separate

check and are not overridden by the routine seven-year default. Record deletion dates, review expiring records annually and securely dispose of business-controlled copies when no hold or longer requirement remains.

Keep minimal contractual and financial evidence separate from transcripts, essays, drafts, sensitive narratives and complete advising email chains. The academic-file deadlines remain unchanged. Deletion covers business-controlled copies, including appropriate downloads, messages, working files and trash. Provider backups, immutable snapshots and recipients' copies may have different limits. Immediate erasure everywhere is not promised. Restoring a backup must not silently reintroduce expired records.

Your choices and requests

You may decline optional academic-profile statistics, flag a private discussion, identify missing documents, correct inaccurate information or request access or deletion through hello@charteredmeded.com. We explain any applicable retention exception or technical limitation. No external AI processing is authorized by this packet. Separate permission is required for testimonials, photos or public application examples. Submission is not permission to contact recommenders, submit applications or publish your identity.

Acceptance and completed copy

We accept the completed packet identified as CME-MENTORSHIP-0.1-20261030, including the documents and versions in its packet register and any expressly identified amendment. We have had the opportunity to read the packet and ask questions. Actual signing dates below do not replace the service dates and payment conditions in the Schedule.

Client legal name: _____

Client signature and actual date: _____

For CHARTERED MEDICAL EDUCATION LLC, authorized representative name and title:

Authorized representative signature and actual date: _____

Record of final completed-copy delivery date and agreed destination: _____