



NewGen

FAMILIES

Intended Parent Handbook

USA

Welcome to the journey of a lifetime...

We are so happy that you're here and we cannot wait to continue this amazing journey with you!

We are your steadfast friend, supporter, and guide on this incredible journey. We're here to ensure your experience is not just beautiful, but also filled with all the information and resources you need. Our team is with you throughout, connecting you with trusted partners and navigating every stage—from now to the birth of your baby, your return home, and beyond.

Your beautiful role as a parent starts now! We want you to be the biggest part of this journey, so keep us updated with communications, questions, thoughts, and feelings so that we can provide the best level of care for your journey.

Intake

Every journey starts with a few small steps. To kickstart your journey, we'll need some documents and reports for our records and to meet legal requirements. It's a necessary and exciting first step in getting your surrogacy adventure off the ground!

Documents NewGen will send you to complete

Each of the following will be sent to you by email through our document management system called PandaDoc. This way, you can easily complete each document electronically, and they'll be sent back to us automatically. Plus, it provides certified copies for those that need it.

Agency agreement

This is the agreement between you and NewGen Families, covering the services provided, costs, payment milestones, and responsibilities throughout your journey. Take your time to review the agreement; we want you to be confident in every detail so that we can all focus on your journey ahead.

Intended Parent (IP) form

A standard personal details form for opening a Client Journey file and maintaining accurate records. If anything changes during your journey, please keep us updated with your latest details.

HIPAA form

Authorizes the release of your protected health information (PHI) to NewGen Families. The Health Insurance Portability and Accountability Act of 1996 (HIPAA) requires healthcare providers to protect the privacy and security of PHI. By completing the HIPAA form, we can smoothly manage your medical records during your journey, primarily in collaboration with your IVF clinic.

Intended Parent (IP) profile

Your profile offers insight into your life, work, family, and future dreams, which can be shared with your potential Surrogate during the matching process. Although not a requirement for your intake, it's a good idea to start thinking about your profile from this early stage, as it will be required once you start the matching process. Your coordinator will provide examples of other

IP profiles, so be sure to have a chat with them when you're ready to start your own!

Reports that you need to provide to NewGen

Criminal Background Check

A standard screening requirement that ensures a smooth journey ahead. All IPs must provide their background check certificate during the intake process and before being matched with a Surrogate. If the criminal background certificate is not in English, it must be translated and notarized. For IPs from the US, NewGen Families will provide you with a document, requesting your permission to conduct a background check on your behalf.

Additionally

The following reports are not a requirement; however, we strongly recommend you undertake these tests so that you can address any existing conditions or concerns, and undertake treatment, prior to traveling to visit your clinic in the USA.

- ▶ Semen analysis
- ▶ STI Screening (HIV, Hep B&C, Syphilis)

Introductions

While you're working on gathering the above documents, your coordinator will begin connecting you with our trusted partners to ensure a smooth journey. For many, this is the exciting start of the IVF and legal journey, where you'll begin formalizing arrangements with your:

- ▶ IVF Clinic
- ▶ Surrogacy Attorney
- ▶ Escrow Manager

Request For Payment (RFP)

Is used to request payment to your escrow account and used to fund your journey. Depending on your agreement terms with NewGen, you may receive an RFP for your payment milestones. All funds are securely managed through your escrow account, following the specified details and timeline outlined in your agency agreement and RFP.

Scheduling your clinic visit

Every IP starts their surrogacy journey uniquely – some visit a clinic for their own fertility treatment or sperm deposit, while others ship existing embryos or sperm from their home country. If you're traveling to a clinic, the NewGen team will assist in scheduling your visit. Plan to allocate about a week for essential tests and deposits during 2-3 clinic visits. The clinic will outline your individual requirements and you will receive a full itinerary from your NewGen team.

Visiting the clinic or shipping sperm or embryos

This is a wonderful opportunity to meet your clinic team face-to-face! If you're depositing sperm, plan to be at the clinic on a Monday, Wednesday, and possibly a Friday for each deposit. Clinic visits are usually brief, leaving you with plenty of time to explore. Reach out to your Coordinator for travel, entertainment, and hotel recommendations in the city you'll be visiting.

If you're considering shipping sperm or embryos, kindly discuss this with your coordinator and clinic team. Strict FDA requirements, specialized care, and specific couriers are involved. Although we don't directly manage or coordinate the shipping process, it's essential to keep us informed about all arrangements being made.

Egg donor selection

This can be an incredibly exciting moment in your surrogacy journey! It can also be quite emotional and confusing as you navigate your requirements against potential donors and their availability. Please feel free to speak in-depth with your coordinator throughout this process. Our team will be able to provide insights on questions to ask the clinic, what your expectations for success may be, and potential impacts on your journey timeline. To begin with, a few considerations for your donor selection may start with:

- ▶ **Matching Preferences:** Consider personal preferences such as physical traits, ethnicity, education, and hobbies to find an egg donor whose characteristics align with your values and desires.
- ▶ **Proven Fertility:** consider a donor based on their history of success with egg donation and embryo creation. Of course, this is not always

a guarantee of future success, however choosing a donor with a successful history can help make your decision a little easier.

- ▶ **Health and Medical History:** Ensure you review the egg donor's health history and that of her family for your peace of mind. Also, confirm that her genetic carrier results are compatible with your own.

Egg retrieval

Once your donor is confirmed, her cycle will be carefully controlled and monitored before undergoing stimulation. The clinic will closely track her progress and set a retrieval date. Anticipate an update from the clinic sharing the total number of eggs retrieved alongside the number of 'mature' eggs retrieved. Mature eggs are crucial for fertilization, so we are definitely wanting to see a strong number of mature eggs.

Fertilization & Embryo creation

Every clinic and laboratory have their own procedures and protocols for fertilization and embryo creation, and they will be happy to guide you through this in detail. Generally, the process involves:

- ▶ **Fertilization:** In the laboratory, eggs and sperm are combined for fertilization. This can be done through traditional insemination or intracytoplasmic sperm injection (ICSI), where a single sperm is directly injected into an egg.
- ▶ **Embryo Culture:** Fertilized eggs develop into embryos during a few days of culture, they will typically be grown to 5-6 days, and you will receive updates as they progress.
- ▶ **Embryo Grading:** Embryos are assessed and graded for quality. You will receive an embryo report for all embryos created.
- ▶ **Preimplantation Genetic Testing for Aneuploidy (PGT-A):** is a screening technique used to assess the chromosomal health of embryos before they are implanted in the uterus. Aneuploidy refers to an abnormal number of chromosomes in a cell, and it is a common cause of failed implantation, miscarriage, or certain genetic disorders. The results can take 1-2 weeks to return and will be definitive on the number of viable embryos you have to proceed to transfer with.

Surrogate Matching

This is one of the most exciting stages of your journey! You will ultimately meet the beautiful person who will be carrying your baby. Be prepared that this can be an incredibly emotional time. Your NewGen team will be alongside to help with anything you need, answer as many questions or talk through any concerns you may have.

The matching process kicks off once you have your beautiful PGT-A tested embryos ready. It's at this point that you need to have your Intended Parent Profile complete (refer to the Intake checklist) as this forms part of the matching process.

The matching process will be led by our Surrogate Program Director, who will outline the Surrogate benefits package, costs, insurance considerations, and delve into the specifics of your matching requirements. Throughout this process, we want you to feel completely at ease and encourage full transparency regarding your preferences for a Surrogate. We want the best match for you!

To give you a bit of insight, the matching process looks a little like this:

- ▶ **Meeting with Surrogate Program Director:** to discuss your requirements, costs, fees, insurances and location considerations. You can also go through any questions you have on Surrogate recruitment, screening and care, the processes involved and what the next steps in your journey may look like.
- ▶ **Sharing of profiles:** You will receive a Surrogate profile to review, and in turn, your profile will be shared with the Surrogate. We encourage as many questions as you have, to be asked at this point. It is imperative that you go through your potential Surrogates benefit package in detail, alongside any considerations additional cost considerations based on her location. We want you to be confident in your financial decisions throughout your journey.

Your matching process starts once you have PGT-A tested embryos

- ▶ **Match meeting:** The final step before mutually agreeing to formalize your journey together. This meeting will be online with your potential Surrogate and either your Coordinator and the Surrogate Program Director, or both! It's a beautiful opportunity to get to know each other in person, ask about their life, dreams, and what they want out of their own Surrogacy journey. This can, at times, be an emotional meeting, and our team will be there to guide you through and ensure you're all cared for throughout.
- ▶ **Post-match meeting:** We will jump on a call with you straight away for a comforting check-in. We allow 48 hours post-match meeting to confirm that you want to move ahead, so during this time, ensure you ask any additional questions to your NewGen team so that you're confident in your decision.

Insurance Considerations

Throughout the matching process, we encourage you to discuss and review any insurance considerations, for your potential Surrogate, with your NewGen team. A few questions that you may choose to discuss are:

- ▶ **Does the Surrogate have existing insurance?**
- ▶ **If so, is it Surrogacy friendly?**
- ▶ **When is open enrollment?**
- ▶ **Am I eligible for an Affordable Care Act (ACA) policy?**
- ▶ **What are the life insurance requirements?**
- ▶ **Can you connect me with an insurance broker to discuss insurance in detail?**

What happens after matching?

This is a wonderful and exciting time that marks the beginning of a beautiful journey with your Surrogate - the bond you form can be life changing!

While the time from here until the transfer may feel a little slow, rest assured that there is a lot happening behind the scenes to ensure everything is perfectly aligned for the transfer.

In the days following the confirmation of your match, your NewGen team will create a group chat with you, your Surrogate, and your NewGen coordinators, allowing you to get to know each other better. Until legal clearance, we request that all communication between you and your Surrogate includes your NewGen team. This ensures we are available to answer any questions and maintains a friendly and supportive atmosphere as you get to know each other. This is also when you will be introduced to your Journey Manager who will be responsible for providing you with updates for the remainder of your journey.

At this point, we will also coordinate a comprehensive medical review and screening, at your clinic, for your Surrogate.

Surrogate Medical Screening

(Process can take 4-6 weeks from match)

Your Surrogate's medical records will be sent to the clinic for review, ensuring her past pregnancies and deliveries were uncomplicated. A 1-day screening at the clinic includes infectious disease labs, drug screen, physical exam, and a Saline Sonohysterogram to check her uterus for abnormalities. Screening results are typically available within 3 weeks, at which point you will receive medical clearance for your Surrogate and can proceed to legal clearance.

Travel arrangements

Your NewGen team will coordinate all travel, accommodations, reimbursements, and stipends for your Surrogate's medical screening. We aim to minimize travel costs while ensuring a smooth and comfortable journey for your Surrogate. All costs will be communicated to you upon booking and again upon completion of the trip, with payments processed through your escrow account.



Legal Process (I)

This is the final step in formalizing the relationship with your Surrogate before you can start preparation for your embryo transfer. This is also known as 'legal clearance' and will swing into action once you have received full medical clearance for your Surrogate. The focus of this phase is to review and sign your Gestational Carrier Agreement.

Gestational Carrier Agreement (GCA)

Process can take 4-6 weeks from medical clearance

A Gestational Carrier Agreement, also known as a surrogacy contract, serves as a legal document outlining the terms and conditions of the surrogacy arrangement between you and your Surrogate.

Your attorney will work directly with you and your Surrogate's attorney to review, negotiate and sign your GCA. It's purpose is to establish the rights, responsibilities, and expectations of you and your Surrogate throughout your journey.

The agreement may cover areas such as compensation, medical procedures, legal parental rights, confidentiality, health insurance and any other relevant considerations. Do not hesitate to ask your attorney questions about specific clauses or terms listed in the agreement, you need to fully understand the agreement, including your role and responsibilities.

Once you have all agreed upon and signed your GCA, another major milestone has been achieved. NewGen, along with your clinic, will be notified of your legal clearance so that you can proceed to the next stage of IVF.

Open contact

Now that your GCA has been agreed upon and signed by you and your Surrogate, feel free to develop your relationship together as you wish! We strongly encourage a group chat, which can also include your Surrogate's partner or her support person, regular video calls, emails, and sharing of many photos!

Of course, at times, questions or concerns in communication may arise. Please always direct any questions or concerns to your coordinator, who can investigate further and provide clarity and insight.

It's a wonderful time to get to know each other and lay the foundation for a beautiful journey together.



The IVF Process

You've navigated through many incredible moments by this stage, and it's about to become even more amazing! Your clinic will have received communication that you've obtained legal clearance, and they will begin preparations for the transfer. Through this time, there are a few key areas that require coordination:

Transfer preparation for your Surrogate

Process can take 4-6 weeks from legal clearance

The clinic's Third-Party Coordinator will discuss the next steps in the IVF process with you and your Surrogate: her Cycle Calendar and Medications. Your Surrogate will receive a cycle calendar and medication list based on the approximate day of your Embryo Transfer. The cycle calendar typically includes:

- ▶ **Daily medications advising timing, dosage and delivery method**
- ▶ **Transfer date**
- ▶ **HCG blood draw dates**
- ▶ **Heartbeat confirmation dates**
- ▶ **Monitoring appointment dates i.e., blood draws and ultrasounds**

Your clinic works closely with your Surrogate to guide her through medication administration, particularly timing and injection methods, based on the cycle calendar.

While your Surrogate is preparing for transfer, you will have conversations with the clinic on the embryos you have available, their quality and which one you would like to transfer. You may choose to transfer based on quality or grading, or you may choose to transfer based on gender.

The clinic staff is always available to you and your Surrogate for any inquiries regarding medications or the preparation process. Don't hesitate to reach out to both the clinic and your NewGen team if you have any questions!

Transfer Travel

Just like your Surrogate's medical screening, your NewGen team will coordinate all travel requirements for her, and her support person, during their visit for the embryo transfer. This can be a nervous and emotional time for your Surrogate, so it is a requirement for your Surrogate to have a support person travel with her for the embryo transfer. Your Surrogate's support person provides emotional and physical support, ensuring that she is well-rested and cared for throughout the trip.

Embryo Transfer

This is one of the most exciting and yet potentially nerve-wracking moments in the entire process! Your Surrogate will have started uterine preparation according to her cycle calendar. Uterine preparation typically spans 21-28 days, during which she undergoes monitoring with ultrasounds and labs at a clinic local to her. Once her uterine lining is ready, your Surrogate will travel to your clinic, where the embryo is thawed and transferred. While some clinics may permit video calls during the transfer, it's essential to discuss this in advance due to varying protocols.

Pregnancy Confirmation

The first BETA, or HCG, test will take place approximately 10 days after the embryo transfer. Beta testing, also known as a beta hCG blood test, plays a pivotal role in confirming pregnancy and measures the level of human chorionic gonadotropin (hCG) in the blood, a hormone crucial for early pregnancy.

Some IP's chose to arrange a home pregnancy test with their Surrogate at 5-6 days post transfer. While this can be tempting, we always advise waiting for your clinic BETA test results, as home tests can return false positives.

If the 1st official BETA test is positive, there will be another BETA test 48 hours later. If this test also returns positive, then CONGRATULATIONS! You are officially pregnant!

Pregnancy

The start of your pregnancy journey is the culmination of many years of dreaming, planning, coordinating and anticipation. It is the start of an incredible journey where your little one grows and develops every day!

By now you will have started to establish a lovely relationship with your Surrogate. We ask Surrogates to keep you updated regularly throughout your pregnancy with any developments and movements. There are also many pregnancy development and milestone apps that can track your little one's growth from a blueberry, to an avocado, a cantaloupe and more!



First Trimester

6-12 weeks gestation

**Note: you are considered 4 weeks pregnant by your first BETA test.*

Heartbeat Confirmation Ultrasound

The Heartbeat Confirmation Ultrasound will be conducted around 6- and 9-weeks' gestation and will determine the growth and heart-rate of the embryo that was transferred. Hearing your baby's heartbeat for the first time is truly one of the greatest moments you will ever experience. While some clinics may permit video calls during the scan, it's essential to discuss this in advance due to varying protocols.

Clinic Graduation to Surrogate's OB Office

You are now officially pregnant and your Surrogate has already completed two ultrasounds! At this time, your Surrogate will graduate to her own OB. Your Surrogate's OB may request that she conduct a NT (nuchal translucency scan).



Second Trimester

13 to 27 weeks gestation

The second trimester of pregnancy is when you can witness some incredible development in your little one! Anticipate significant growth, as your Surrogate's belly gradually expands each week and you may also start to observe some delightful movements as you move into the third trimester.

Surrogate Appointments

Your Surrogate will be cared for by her OBGYN and you will be notified of each appointment in advance. We always ask that your appointments are scheduled at a time suitable for international IP's, however this can prove difficult when also taking into considering the availability of the clinic and your Surrogate.

There are a few standard tests that can be performed as part of a regular pregnancy. They can be:

- ▶ **Non-invasive Prenatal Test (week 12-13)** During pregnancy, some of the baby's DNA passes through your Surrogate's bloodstream. The NIPT analyses the genetic information contained in this DNA to screen for several chromosomal abnormalities.
- ▶ **Nuchal translucency (week 13-14)** is an ultrasound scan that measures your baby's nuchal translucency; a fluid-filled space behind your baby's neck. This measurement can help your doctor estimate the risk of your baby having a chromosomal abnormality such as Down syndrome.
- ▶ **Echocardiography and Foetal Morphology (week 19-20)**
 - Foetal echocardiography is an ultrasound of the heart and surrounding tissue, size and movement.
 - Foetal Morphology is an ultrasound that examines your baby's heart, spine, head, stomach, kidneys, and facial structure. This is done to be able to confirm any problems early on, and to start eventual treatments.
- ▶ **Glucose Tolerance Test (week 26-28)** is used to screen for type 2 diabetes in the Surrogate. This is commonly known as gestational diabetes, a type of diabetes that develops only during pregnancy.

Newborn Insurance

Start discussion at Embryo Transfer

The Embryo Transfer stage also prompts a discussion about Newborn Insurance. Your NewGen team will initiate the conversation and provide you with a list of multiple insurance brokers to contact. Our advice is to make this a priority and take out a policy ASAP.

While optional, purchasing a Newborn Insurance policy is highly recommended. It offers coverage for medical expenses related to your newborn's health, providing security in case of unexpected complications or extended hospital stays for your little one.

Legal Process (II)

Depending on the state where the Surrogate lives and gives birth, you will need to obtain a pre-birth or post-birth order to establish your legal parentage of your baby. Your surrogacy attorney can help you file the necessary paperwork, will know the appropriate time to file the paperwork and represent you in court if needed.

To give a little insight into establishing parentage in the USA, each state will generally fall into one of two camps, either a **pre-birth order** state or a **post-birth order** state.

- **Pre-birth order** is a legal document that is filed before the birth of your baby. It sets up you, the intended parents', legitimate rights to the child and clarifies parental rights and obligations well in advance of the birth. Pre-birth orders are wonderful as they guarantee clarity from the start.
- **A post-birth order** declares you as legal parents with all parental rights and obligations, but it is obtained after your baby is born. It's a good idea to ask your attorney about the expected timeline for implementing a post-birth order, depending on your Surrogate's state, during the matching process.



Third Trimester

Weeks 28 to birth

The final Trimester is where your anticipation and excitement truly kicks in. Your little one will be growing and kicking and getting ready to meet you!

Your NewGen team will send you a Birth Preparation manual to help you plan the arrival of you little one. You will also start documenting your Birthing and Emergency Plan with your Surrogate to ensure everyone is on the same page when the big day arrives.



Travel

By now, you will have started planning for your travel to your Surrogate's hometown, or the location where she will be giving birth. We always advise that you arrive 3 weeks prior to the birth, to allow time for you to settle but also enough time if your baby arrives earlier than expected.

Your NewGen team will send you a Birth Preparation manual to help you plan the arrival of you little one.

Birthing Plan

A Birthing Plan outlines your preferences and wishes for the labor and delivery process of your baby with your Surrogate. It includes specific details about how you envision the birth experience, such as your presence in the delivery room, involvement in decision-making, and any special requests you may have.

Your Birthing Plan may also address unique aspects related to your GCA. This could involve your Surrogate's preferences, communication protocols between you and your Surrogate during labor, and arrangements for the immediate postpartum period.

Clear communication and collaboration between you and your Surrogate, as well as discussions with the healthcare providers involved, are crucial for creating a Birthing Plan that respects everyone's wishes and ensures a positive and supportive experience for all parties involved.

A few things you may consider including in your Birthing Plan are:

- ▶ Who will be present in the delivery room for the birth?
- ▶ From what position, in relation to your Surrogate, will you witness the birth?
- ▶ Are you allowed to take photos or videos of the delivery?
- ▶ Who will cut the umbilical cord?
- ▶ Who will be responsible for advising the Doctors/Nurses of the Birthing Plan?

Emergency Plan

Even the best-laid plans can, at times, not unfold as envisaged. It's crucial to establish an Emergency Plan that can be activated if you are unable to attend the birth of your baby. This plan outlines the process for the care of your baby in your absence and specifies the role you desire for your Surrogate during this time.

Birth

It's finally here! The day you've been waiting for. You'll be in close contact with your Surrogate, and she, or her support person will inform you when labor begins. Your NewGen team will provide remote support and guidance throughout. Ensure your hospital has received the Birthing Plan, and it's recommended to bring a copy with you.

Breathe, and enjoy what will no doubt be one of the most incredible experiences of your life.

We can't wait to hear to see photos, hear your beautiful birthing story and celebrate your new family member!

Post-Birth

While you're happily navigating life with your little one, there are a few more items to attend to before you can return home. While NewGen cannot help directly with any the post-birth coordination, if you would like assistance, we can refer you to professionals who can.

We will discuss these areas with you in the third trimester and provide you with manuals to assist which will detail:

- ▶ What happens post birth?
- ▶ Birth certificate
- ▶ US Passport
- ▶ Citizenship by descent
- ▶ Escrow finalization





Your new life

While your official journey with NewGen may be ending,
the biggest journey of your life is only just beginning.

With love and gratitude, we wish you all the best
as you settle into your new life.

Thank you for trusting us with your family.

“There is nothing more beautiful than
someone who goes out of their way to
make life beautiful for others.”

-Mandy Hale

