

Protect what matters most—now and always

Legal assistance for estate planning



Planning ahead is a powerful way to protect the people you love. With your legal plan, you have access to essential estate planning tools that ensure your wishes are honored and your family is cared for, no matter what lies ahead.

What's covered:

Will: Ensures your assets go where you intend and your loved ones are protected.

Living Trust: Lets you distribute property while you're alive and may help reduce taxes.

Living Will: Outlines your medical care preferences, easing the burden on your family during difficult times.

Durable Power of Attorney: Appoints someone you trust to make decisions if you're unable.

Probate Avoidance Documents: Tools like a transfer-on-death deed or revocable living trust can help your home pass directly to your chosen beneficiaries.



The cost savings

Example of covered services	Without a legal plan ¹	With a legal plan
Wills (employee & spouse)	\$782	\$0 out of pocket
Living trust	\$1,955	\$0 out of pocket
Living will	\$391	\$0 out of pocket
Durable power of attorney	\$391	\$0 out of pocket
Total cost	\$3,519	\$216 per year

Potential savings

\$3,303

Consider this scenario:²

When Carlos and Elena welcomed their second child, they knew it was time to plan for the unexpected. They'd heard stories about the confusion families face when a loved one passes without a will. Determined to avoid that, they used their legal plan to connect with an attorney and start their estate planning.

The attorney drafted a will ensuring their children would be cared for and a living trust to simplify the transfer of their home. And a durable power of attorney gave each of them peace of mind knowing decisions could be made if one of them became incapacitated.

67%

Sixty-seven percent of employees have experienced a legal situation in the past five years⁴



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800-821-6400**

1. Average hourly rate of \$391.00 based on years of legal experience, National Law Journal and ALM Legal Intelligence, Survey of Law Firm Economics (2021).
2. This testimonial is for illustrative purposes only.

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