Will and Trust Preparation Services

Benefits For Your Financial Well-Being

Will and Trust Preparation is an important employee benefit that contributes to financial well-being for you and your family.

About 70% of the US population does not seek legal counsel, due to cost concerns. Yet, when confronted with estate planning and related legal matters, most people do not know where to turn to obtain professional guidance, nor can they afford the services they need.

An estate planning program like Will and Trust Services provides easy access to a wealth of online information on estate planning, from articles on a variety of legal and financial topics, to financial calculators and legal forms. In addition, an online self-directed will preparation tool enables you to prepare important legal documents in less than an hour.

Uniting Flexibility, Convenience and Value

The Will and Trust Preparation Services program provides you and your family with online access to estate planning information and tools via an easy-to-use Website. The program includes access to a self-service will preparation tool or 1:1 document preparation assistance for a discounted fee. What's more, because these services are automatically included with your company's life insurance plan, there is no charge for the program.

Here is an overview of the Will and Trust Preparation Services program:

- **Legal Library:** In-depth articles covering a wide variety of current legal topics, as well as frequently asked questions and answers from attorneys.
- **Legal Forms:** Thousands of sample legal forms to cover various legal situations, including estate planning, wills and trusts, living wills, power of attorney and more.
- **Legal Tools:** A self-directed will and trust preparation tool that enables you to create a will, financial power of attorney, living will or final arrangements -- online in less than one hour. You can prepare documents by following detailed instructions and then save those documents online and update them later. (Registration required.)
- **Assisted Document Preparation:** Discounted document preparation assistance from one of the leading national document preparation companies (Fee required.)

The website also provides financial articles covering a wide variety of financial topics, as well as online tools and calculators to assist with investing, retirement, home financing and other financial decisions.

For more information, visit **www.CLCmembers.com**.

Will and Trust Preparation Services

Easy online access

www.CLCmembers.com

User Name: **uhc**

Password: **legal**

- Access to information on estate planning, including articles, forms and financial calculators
- Online, self-service will preparation tool
- Assistance with will and trust document preparation for discounted fee

All services on the CLC Web site are provided through CLC Incorporated and/or LegalZoom.

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Website Instructions

- Go to **www.CLCmembers.com**
- When you get to the Log-In Screen, enter the following User Name and Password

  User Name: **uhc**
  Password: **legal**

- After successful login, you may access information about estate planning and other legal-related services.
  - To access a variety of informational articles, click on **Legal Library**. Articles, frequently-asked questions and other materials are organized by topics, such as Wills and Estate Planning.
  - For an alphabetical list of legal forms, click on **Legal Forms**. Forms are organized in various categories such as Estate Planning (for Estates, Trusts, and Wills) and Powers of Attorney.
  - To independently prepare a legal document, click on **Legal Tools**. You must first register before you can begin preparing will or trust documents online.
  - For assistance with legal document preparation, click on **Assisted Document Preparation**. You will be instructed in how to engage a document preparation specialist at LegalZoom to assist you in the completion of your chosen legal documents. In order to take advantage of discounted prices on document preparation, you must:
    - Call **1-800-773-0888**
    - Identify yourself as a member of CLC
    - Use the discount code of **CLC888**

About Us

UnitedHealthcare Specialty Benefits unites health and financial well-being for individuals and organizations, through integrated and personally relevant products, services and technologies. UnitedHealthcare Specialty Benefits is a brand of UnitedHealth Group. For more information, visit **www.myuhcspecialtybenefits.com**.

Will and Trust Preparation Services are provided by CLC Incorporated.

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