

Financial
Protection

Life insurance

Will and trust preparation services



Preparing a will is one of the most important things you can do for your loved ones. But some people don't consult with an attorney because of the cost. And they're not sure how else to handle their estate planning responsibilities.

That's why at UnitedHealthcare, we offer life insurance products with an added benefit: will and trust preparation services. With these services, you can access a wealth of estate planning information online, use financial calculators, download legal forms and use a will-preparation tool that allows you to prepare your own official legal documents.

Program overview.

Our will and trust preparation services, which are provided by Consolidated Legal Concepts, Inc. (CLC), are available to all members covered by our life insurance products at no additional premium cost. Members interested in using assisted document-preparation services may incur a minimal cost.

In brief:

- Will and trust preparation assistance is an added benefit of your UnitedHealthcare life insurance plan
- Access a wealth of information on estate planning and use online tools to prepare legal documents
- To access, visit CLClegalforms.com

Through CLC, you have access to the following resources:

- **Legal library:** Educational articles on a wide range of legal and financial topics, as well as attorneys' answers to frequently asked questions¹
- **Legal forms:** Standard legal forms for each state covering various legal situations, including estate planning, wills and trusts, living wills and power of attorney
- **Legal tools:** A self-directed will and trust preparation tool that enables you to create legal documents — including a will or power of attorney — in less than an hour. Documents can be stored online so you can access and update them in the future (registration required)
- **Assisted document preparation:** Get discounted document-preparation assistance from one of the leading national document-preparation companies (fee required).² To take advantage of discounted prices on document preparation, call **1-800-773-0888** and identify yourself as a member of CLC.³ Your discount code is **CLC88**

Easy online access to a wealth of information.

To access the will and trust preparation services, visit:

- **CLClegalforms.com**

The CLC Legal Resource Center will be displayed, allowing you to access articles, forms, legal and financial tools and more.



¹Online reference material provided by CLC, Inc.

²Users receive a 10% discount on assisted document-preparation fees. The fee must be paid online with a credit card to initiate the document-preparation process.

³Assisted documentation-preparation services provided by Legal Zoom, an online legal document service. Employees interested in assisted document-preparation services may incur a minimal cost.

UnitedHealthcare Life products are provided by UnitedHealthcare Insurance Company; and in California by Unimerica Life Insurance Company; and in New York by Unimerica Life Insurance Company of New York. UnitedHealthcare Insurance Company is located in Hartford, CT; Unimerica Life Insurance Company is located in Milwaukee, WI; and Unimerica Life Insurance Company of New York is located in New York, NY.

Specialty benefits and programs may not be available in all states or for all group sizes. Components are subject to change.