

Will Preparation Services

Frequently Asked Questions

What are Will Preparation Services?

This service, offered through MetLife Legal Plans, fully covers attorney fees for preparing or updating a will, living will or power of attorney when you use a network attorney.

Am I eligible for this service?

MetLife Supplemental Term Life, Group Universal Life and Group Variable Universal Life Plan (collectively, MetLife Group Life Plan) policyholders, along with their spouses/domestic partners, are eligible for this service.

What are the covered services?

Covered services include:

- Preparation and updates of wills (including complex wills and codicils), living wills, medical powers of attorney, and healthcare proxies for you and your spouse/domestic partner.¹
- In-person or phone consultations with an attorney.
- Unlimited access to prepare or update a will as long as you remain in an eligible MetLife Group Life Plan. Will Preparation Services are only available for spouse/domestic partners when employee coverage is elected for an eligible MetLife Group Life Plan.

Are ancillary documents included?

Yes, this service includes assistance with living wills, codicils, testamentary trusts, and powers of attorney.

Exclusions: Additional fees apply for living trusts and tax planning. The attorney will provide guidance and a written fee statement for these services in advance.

Are there additional fees charged to my plan²?

No, covered services are included at no extra cost with your MetLife Group Life Plan. Using a network attorney involves no claim forms or co-payments. If additional work is requested beyond the service, the attorney will provide you with a written fee statement in advance.

How can I access this service?

To get started, contact a Client Services Representative:

- Call MetLife Legal Plans at **1-800-821-6400**.
- Provide your company name and the last four digits of the Plan member's Social Security Number (SSN) or Employee ID.

The representative will help you find a local participating attorney. Next, contact the attorney's office to schedule an appointment directly with them. Many offer evening and Saturday appointments.

You may also use our digital estate planning solution. To get started, create an account at legalplans.com/estateplanning and follow the self-guided process to complete your estate planning documents in as little as 15 minutes.

Is there a limit to how often I can update my will?

No, as long as you're an active participant in a qualifying MetLife Group Plan, you can meet with a participating attorney as often as needed to update your will.

How often should I review and update my will?

It's recommended to review your will every 5 to 10 years, or soon after a life-changing event such as marriage, divorce, or the birth of a child.

Can I use an attorney outside MetLife Legal Plans network?

Yes, you can use an out-of-network attorney. You'll be reimbursed for covered services based on a set fee schedule², but you'll be responsible for any fees exceeding the reimbursed amount.

What is the average turnaround time to prepare or update a will?

Wills typically take about one week to complete, though the attorney will take as much time as needed to meet your needs.

Does my spouse/domestic partner need a joint will with me in order to take advantage of this service?

No, you and your spouse/domestic partner can each prepare separate wills with a participating plan attorney.

Does this feature offer translation services for non-English speakers?

Yes. Network Attorneys have access to translation services and some attorneys have alternate language abilities.

Am I responsible for storing the executed documents?

Yes. The MetLife Legal Plans Network Attorney will provide the original documents to you and recommend proper storage, but it's your responsibility to store them safely.

What are my options if I am not satisfied with the service provided by a participating plan attorney?

MetLife Legal Plans regularly screens its network of attorneys. If you're dissatisfied with a participating attorney, please contact MetLife Legal Plans at **1-800-821-6400**, and we'll work to resolve the issue to your satisfaction.

What are the minimum requirements for an attorney to be part of MetLife Legal Plans network?

Managing attorneys in the network must have at least eight years of experience and adhere to a "code of excellence."

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1. Will Preparation Services are only available for spouse/domestic partners when employee coverage is elected for an eligible MetLife Group Life Plan.
 2. You can also use an out-of-network attorney and be reimbursed for covered services based on a set fee schedule, though you will be responsible for any fees exceeding the reimbursed amount. Will Preparation is offered by MetLife Legal Plans, Inc., Cleveland, OH. In some states, legal services are provided through insurance underwritten by Metropolitan General Insurance Company, Warwick, RI. For New York situated or principally located cases, the service includes office consultations and advice for other legal matters beyond Will Preparation. Tax planning and Living Trust preparation are not covered.

Nothing in these materials is intended to be advice for a particular situation or individual. Please consult with your own advisors for such advice. Like most group insurance policies, insurance policies offered by MetLife contain certain exclusions, exceptions, waiting periods, reductions, limitations and terms for keeping them in force. Please contact your benefits administrator or MetLife for costs and complete details.