MetLife | Life Insurance

Will Preparation Services

Want to know more about Will Preparation Services? Find out with some FAQs.



You asked. We answered.

What are Will Preparation Services?

A. This service, offered through MetLife Legal Plans, fully covers attorney fees by a Network Attorney for preparing or updating a will, living will, or power of attorney.

Am I eligible for this service?

A. You are eligible for this service **if you are enrolled in MetLife's Supplemental Term Life** coverage. As a life policyholder, your spouse/domestic partner also has access to this service.

What are the covered services?

A. **Covered services:**

- Preparing and updating wills, including complex will(s) and codicils, living will(s), power(s) of attorney for medical directives, and healthcare proxies for both you and your spouse/domestic partner.[1]
- In-person or telephone consultations with an attorney in a private and supportive environment.
- Unlimited access to prepare or update a will for as long as you continue to participate in an eligible MetLife Group Life Plan.

Advantages include:

- Convenient access to a local attorney
- Extensive network of participating plan attorneys
- Professional Client Service Center to assist you in locating an attorney

Are ancillary documents included?

A. Yes. Assistance with some ancillary documents such as all living wills, codicils, testamentary trusts, and powers of attorney are included with this service.

Exclusions: There is an additional fee associated with living trusts and tax planning needs. The participating plan attorney can provide guidance on living trusts and how to approach tax issues related to a will. The attorney will provide a written fee statement detailing any associated costs in advance of providing these services.

Are there additional fees charged to my plan[2]?

A. No. Covered services are available to you with your MetLife Group Life Plan. When you use a network attorney there are no claim forms or co-payments to file — fees are included in your plan and the attorney handles all the paperwork. If you ask the attorney to provide additional work that is not fully covered under this service, the attorney will provide a written fee statement detailing any associated costs in advance of providing the service.

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

A. No. As long as you are an active participant in a qualifying MetLife Group Plan, you can meet with a participating plan attorney as often as you deem necessary to keep your will up to date.

Will Preparation Services

How can I access this service?

A. Simply contact a Client Services representative to get started.

- Call MetLife Legal Plans' toll-free number at 1-800-821-6400.
- Provide your company name and the last four digits of the Plan member's Social Security number or employee number.

The Client Service Representative will help you locate a local Plan Attorney to provide the Will Preparation Service. Then call the Plan Attorney's office and schedule an appointment at your convenience. Most Plan Attorneys are available evenings and Saturdays by appointment.

To use our online estate planning solution, create an account at www.legalplans.com/estateplanning

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

A. Wills can vary in complexity but can generally be produced in approximately one week. The attorney will take as much time as needed to work with you to meet your needs.

How often should I review and update my will?

A. It's good practice to review your will every five to 10 years with an attorney, and it's especially important to review a will whenever a life-changing event occurs, such as marriage, divorce, birth of a child, etc.

Can I use an attorney outside MetLife Legal Plans network?

A. Yes. You can choose to use an out-of-network attorney if needed. When using an out-of-network attorney, you will receive reimbursement for covered services based on a set fee schedule.[2]

However, you will be responsible for any attorney fees that exceed the reimbursed amount.

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

A. No. You and your spouse/domestic partner can prepare separate wills with a participating plan attorney.

Does this feature provide translation services for participants for whom English is not their primary language?

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

Am I responsible for storing the executed documents?

A. Yes. The MetLife Legal Plans Network Attorney will provide the original will to you upon its completion. The attorney will provide advice on how to properly store the will, but it is your responsibility to store the will in a safe place.

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

A. MetLife Legal Plans carefully screens and manages its network of participating plan attorneys on a regular basis. If you are dissatisfied with the service provided by a participating plan attorney, you can notify MetLife Legal Plans and they will work with you to resolve any issues to your satisfaction.

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

A. The managing attorneys at a firm are required to have a minimum of eight years of experience to be in the network and must adhere to a "code of excellence."

1. Will Preparation Services is only available for spouse/domestic partners when employee coverage is elected for Supplemental Term Life, Group Universal Life or Group Variable Universal Life.
2. You also have the flexibility of using an attorney who is not participating in the MetLife Legal Plans network and being reimbursed for covered services according to a set fee schedule. In that case you will be responsible for any attorney's fees that exceed the reimbursed amount. Will Preparation is offered by MetLife Legal Plans, Inc., Cleveland, Ohio. In certain states, legal services benefits are provided through insurance coverage underwritten by Metropolitan General Insurance Company, Warwick, Rhode Island. For New York situsued or principally located cases, the Will Preparation service is an expanded offering that includes office consultations and telephone advice for certain other legal matters beyond Will Preparation. Tax Planning and preparation of Living Trusts are not covered by the Will Preparation Service
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Nothing in these materials is intended to be advice for any 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.
MetLife Group Term Life insurance is issued by Metropolitan Life Insurance Company, 200 Park Avenue, New York, NY 10166 under Policy Form GPN99/G2130-S.

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