



MetLife Advantages Digital Estate Planning FAQ



Q: Who can use the digital estate planning experience through MetLife Advantages?

A: Our digital estate planning solution is available to an employee and their legally married spouse¹ when enrolled in employee-paid [Basic Life, Supplemental/Optional Term Life, Group Universal Life (GUL) and/or Group Variable Universal Life (GVUL) insurance coverage] or employer-paid Basic Life that includes estate planning services (i.e. Face-to-Face Will Preparation) at no cost.²

The process is designed to work for most people, but if there are aspects of their estate that are more complicated, the member might be directed to reach out to a MetLife Legal Plans network attorney instead of using the online process.

Q. Where do MetLife Advantages members go for digital estate planning?

A: MetLife Advantages members will go to legalplans.com/estate planning to create an account and begin the estate planning process. They will be prompted to set up a new account by entering their email and creating a password. They will be asked to provide some personal information, including full name, employer and zip code, to confirm their eligibility.

Q: What documents can a member complete through the digital estate planning solution?

A: Each estate plan includes the following three documents:

- **Last Will and Testament** – Leave property to loved ones and choose guardians for minor children.
- **Living Will** – Plan for a medical emergency and select medical care preferences.
- **Durable Financial Power of Attorney** – Choose someone to manage finances in case of an emergency.

Q: How do members create an estate plan?

A: Members can create an estate plan by answering a few personal questions about themselves, their family and their assets. Members will be guided through the process, providing the information needed to create the documents instantly, according to their wishes and the laws of their state.

Members will have a chance to review the documents and change any of their wishes before signing. The entire process takes about 15 minutes from start to finish. Members do not need any documents gathered prior to starting; they will simply be asked simple questions about their family and their assets.

Q: How does the video notary process work?

A: After the member completes all the website questions and obtains the digital version of their estate planning documents, they will connect via video with two witnesses and a notary, so they can sign their documents online. **Currently, this is only available in California. We will announce more states as they are ready.**

Q: What if a member cannot sign their estate planning documents online?

A: For members in states where digital signing is not available, members simply need to print and sign their documents following the instructions on the cover page of each document.

Q: Where can members get access to a notary?

A: Notaries are widely available at most banks, UPS and FedEx locations.

Q: Are documents stored online?

A: Yes, documents will be saved within their account and they can come back to access them at any time using their email and password to log back in.

Q: Is this available in all of the U.S.?

A: MetLife Advantages digital estate planning is not available for customers that are situated in Florida. In addition, it is not available in Guam, Puerto Rico, Virgin Islands and other U.S. territories.

Q. Can I still access the in-person Will Preparation service?

A: Yes. If a member is eligible for MetLife's Will Preparation services, they will continue to be able to work with an attorney directly for their estate planning needs.

Q: Can MetLife Advantages members search for attorneys on the website?

A: Yes, members will have access to search our attorney network online if they prefer to do their estate planning with an attorney. Members can search by location, by coverage type, or language spoken.

Q. Is the website and digital estate planning experience available in Spanish?

A: No. Digital estate planning is only available in English at this time.

1. At this time, the digital estate planning services does not support domestic partnerships, however members in a domestic partnership may use a plan attorney for their estate planning needs.
2. Digital estate planning is not available for participants covered under Legacy Paragon GVUL/GUL.

[metlife.com](https://www.metlife.com)

Group legal plans are provided by MetLife Legal Plans, Inc., Cleveland, OH. In certain states, group legal plans are provided through insurance coverage underwritten by Metropolitan Property and Casualty Insurance Company and Affiliates, Warwick, RI. For costs and complete details of the coverage, call or write the company.

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 your MetLife Group Representative for costs and complete details.

