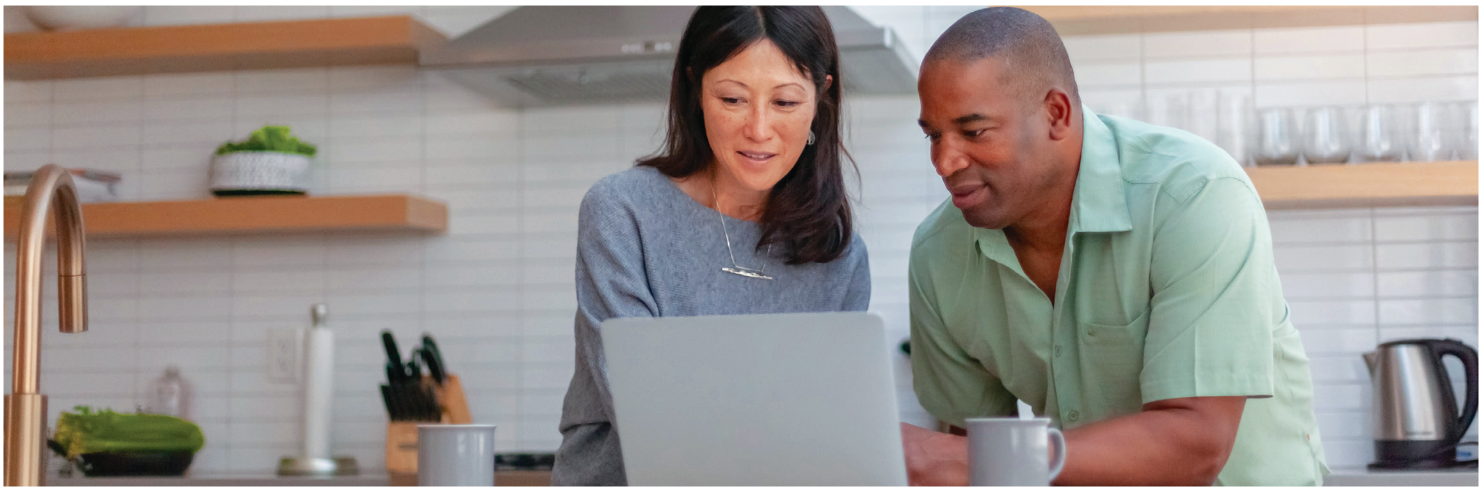
Financial, Legal, and Estate Support.

Expert help your employees may need.

Financial and legal issues touch the life of every individual. Without the appropriate information, these situations can become time-consuming and stressful, affecting job productivity, and peace of mind. Our Financial, Legal, and Estate Support program provides consultative experts to meet the needs of your business and employees.[1]

- Unlimited financial and legal consultations
- Enhanced digital resources and single point of contact, including one portal and phone number for services
- Reporting of utilization and analytics



Our suite of value-add resources includes:

FinancialConnect®

The team of financial specialists can help employees and their families manage money challenges that can affect emotional well-being and the bottom line.

Your employees have access to unlimited, objective financial guidance through an in-house team of qualified experts, including CPAs, CFPs and other financial professionals. For individuals requiring more extensive investment, or financial planning expertise, our experts can provide a referral to a financial professional in their local communities.

FinancialConnect® provides:

- Unlimited financial information, including debt management, family budgeting, estate, and tax planning
- Interactive tools, calculators, and in-depth financial education
- Centralized digital access at GuidanceResources® Online

LegalConnect®

We offer employees access to a full staff of legal experts, unlimited phone consultations, local attorney referrals, and other professional resources. An employee can receive assistance from an in-house team of legal experts, who provide unlimited information and guidance on issues such as divorce, adoption, estate planning, and real estate.

LegalConnect® provides:

- Easy access to an in-house staff of attorneys exclusively dedicated to phone consultations
- Referrals to local attorneys for a free 30-minute consultation and a 25% reduction in fees thereafter
- Information on low-cost and no-cost legal options
- Referrals to consumer advocacy groups and governmental organizations

EstateGuidance®

This user-friendly online tool allows employees and their family members to write a last will and testament, a living will, and a document outlining their wishes for final arrangements quickly, easily, and cost effectively. EstateGuidance walks users through the entire process, guiding choices with a series of questions, and breaking down each step into easy-to-understand terms. Accessible anytime, anywhere via tablet, desktop, or mobile app, EstateGuidance eliminates the barriers to estate planning.

Learn more about our value-add offerings.

To learn more about our value-add offerings, contact your New York Life Group Benefit Solutions representative.

NEW YORK LIFE GROUP BENEFIT SOLUTIONS

1. All programs are effective to the member/participant on the first day of coverage.

These programs are NOT insurance and do not provide reimbursement for financial losses. Some restrictions may apply. These services are provided exclusively by ComPsych® Corporation, effective 1.1.2023. Customers are required to pay the entire discounted charge for any discounted products or services available through these programs. Some service available at the option of employer for an additional cost. Programs are provided through third party vendors who are solely responsible for their products and services. Full terms, conditions and exclusions are contained in the applicable client program description and are subject to change. Program availability may vary by plan type and location and are not available where prohibited by law. These programs are not available under policies issued by New York Life Group Insurance Company of NY. The partnership is between New York Life Insurance Company and ComPsych® Corporation. ComPsych® is not affiliated with New York Life Insurance Company or any of its affiliates.

New York Life Group Benefit Solutions products and services are provided by Life Insurance Company of North America or New York Life Group Insurance Company of NY, subsidiaries of New York Life Insurance Company. Life Insurance Company of North America is not authorized in NY and does not conduct business in NY.

New York Life Insurance Company

51 Madison Avenue
New York, NY 10010

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