

Solutions for all your financial & legal challenges

Financial, Legal & Estate Support



We know financial and legal challenges can be very stressful for you and your family. That's why New York Life Group Benefit Solutions provides our Financial, Legal & Estate Support program¹ to help eligible policyholders and members of your household navigate these issues, at no additional cost. Leaving you with fewer worries.

Our suite of value-add resources includes:

› **FinancialConnect[®]** Sometimes you may not know where to start when facing a stressful financial challenge or when you need financial planning expertise. With FinancialConnect,[®] you and your family members have unlimited access to a team of qualified experts including Certified Public Accountants (CPAs), Certified Financial Planners[™] (CFP[®]), and other financial professionals to help guide you. If additional help is needed, you can request referrals to financial professionals in your local community.

In addition, on guidanceresources.com, you will have access to financial information on a wide range of topics including debt management, family budgeting, estate planning and tax planning as well as interactive tools and financial calculators.

› **LegalConnect[®]** If you are facing a difficult legal challenge and don't know where to start, LegalConnect[®] can help. This program gives you access to unlimited phone consultations with a staff of attorneys who can provide guidance on issues such as divorce, adoption, estate planning, real estate, and identity theft. If needed, you can be referred to a local attorney for a free 30-minute consultation and a 25 percent reduction in fees thereafter. Lastly, information on low cost and no legal options are available, along with referrals to consumer advocacy groups and governmental organizations if needed.

See additional information on next page ›



GROUP BENEFIT
SOLUTIONS

› EstateGuidance®

This user-friendly online tool allows you and your family members to write a last will and testament, a living will and documents outlining your wishes for final arrangements quickly, easily and cost-effectively. EstateGuidance® walks you through the entire process, guiding your choices with a series of questions and breaking down each step into easy-to-understand terms. Access is available anytime, anywhere via tablet, desktop, or mobile app.



Contact Information

24/7 — Financial, Legal & Estate Support



Phone: **(800) 344-9752**



Website: guidanceresources.com

First time visitor? Click "Register" and enter "NYLGBS" as the Organization Web ID.

1. 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. Customers are required to pay the entire discounted charge for any discounted products or services available through these programs. Some services are available at the option of the 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.

Financial Connect, Legal Connect, Estate Guidance and Guidance Resources are registered trademarks of ComPsych® Corporation.

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

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 and New York Life Insurance and Annuity Corporation, 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

© 2024, New York Life Insurance Company. All rights reserved. NEW YORK LIFE, and the NEW YORK LIFE Box Logo are trademarks of New York Life Insurance Company.

123745 a 0924 SMRU 5015535.2 Exp. Date 08.28.2027