

lifeplan.legalzoom.com

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lifeplan®



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What is LifePlan

LegalZoom LifePlan[®]
is a benefit that
provides members
with support in
three major areas—
financial, legal, and
asset protection.



Why LifePlan

Imagine your life

When you think about what you want to do next—traveling, buying a home, cutting down your debt—are you certain that you have everything you need to achieve your goals?

With LifePlan

We put a team right in your back pocket. No more searching on your own for hours or asking friends and family, with questionable results.

Our independent legal and financial professionals can answer your questions, help you set goals, and support you in reaching them.

Without LifePlan

It can be difficult to tell if you're on the right path when you search for answers on your own.

When you get help from friends or family, you can't always be sure their recommendations are accurate and won't cost you more in the long run.

Not everyone can afford to have a team of professionals at their disposal. Plus, you have to know the right people and trust that they'll have the expertise they need.

LifePlan price

2 cups of coffee or
a matinee movie ticket or
1 domestic beer or
a bowl of ramen


\$6.⁹⁵

semi-monthly

How it Compares

We've compared the main features of LifePlan—and how often you can access them—with the typical cost of doing them on your own.

As it turns out, LifePlan is just a fraction of the cost, and you have access to each service for a full year. Not to mention the time and possible mishaps you can save yourself from...

	<i>legalzoom</i> lifeplan [®]	DIY
Financial (Typical 30 minute consultation)	Unlimited (For new topics)	\$113
Attorney (Typical 30 minute consultation)	Unlimited (For new topics)	\$175
Estate plan for 2 (Typical attorney assisted plan)	Included	\$1,500
Identity theft protection for 2 (Lifelock standard annual plan)	Included	\$240
Advice from friends or family (could be misleading)	Not included	\$0 + 
Total	\$166.⁸⁰ per year \$6.⁹⁵ semi monthly	\$2,028

What's included

Financial

- Talk to our in house Certified Financial Planner
- Set financial goals and create an action plan
- Talk to independent tax professionals
- Financial power of attorney for 2 people

Legal

- Talk to independent attorneys
- Create a living will for 2 people
- Annual legal check up
- Legal document review
- Access to over 170 legal forms
- 10% off selected LegalZoom products

Asset protection

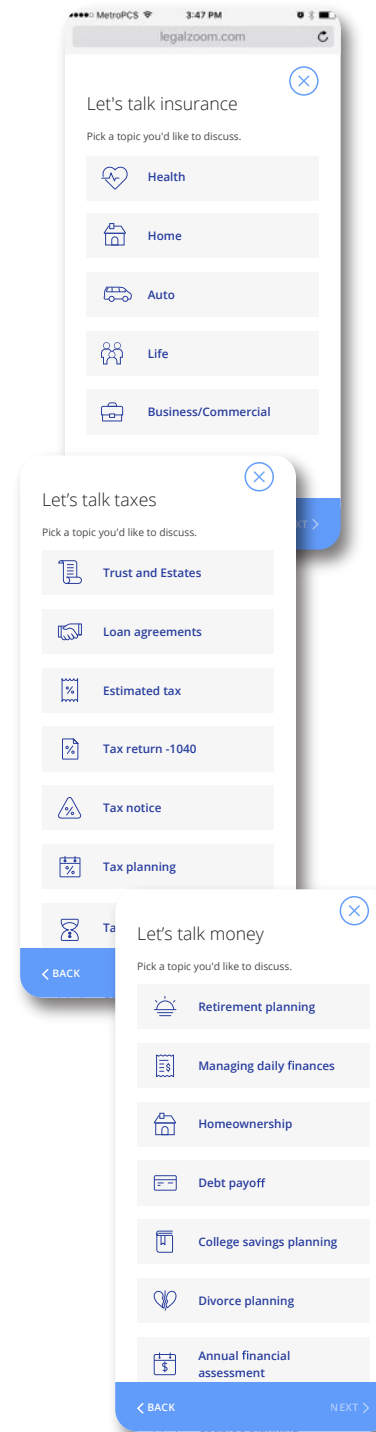
- Create a will or trust for 2 people
- Identity theft protection for 2 people
- Talk to independent insurance professionals
- Unlimited cloud storage



Financial

Why you need it

At LifePlan, we want as many people as possible to know the value of financial planning and tax advice. Regardless of your current financial situation, talking to a Certified Financial Planner or tax professional can help you achieve your goals, faster.



How it works

LifePlan's in house Certified Financial Planner can help you determine where you really stand, and suggest actionable steps for improvement. Discuss things like paying down your debt, your retirement, saving for a house and more.

Our independent tax professionals can help you maximize your deductions and answer any other tax questions you might have.

Simply log in to your LifePlan account from any device, click "Schedule a session", and pick a date and time that works for you. Prepare for your session by gathering any necessary documents and compiling some questions, and they'll give you a call.

Each session with an independent tax professional or Certified Financial Planner typically lasts 20-30 minutes, but you can talk to them as many times as you need throughout the year.

Legal

Why you need it

Having access to a trusted independent legal professional can give you the confidence and support you need as you work through your legal issues. They can also provide support with things you may never have thought to get legal advice for, like rental lease review or traffic tickets.

Our additional legal support includes:

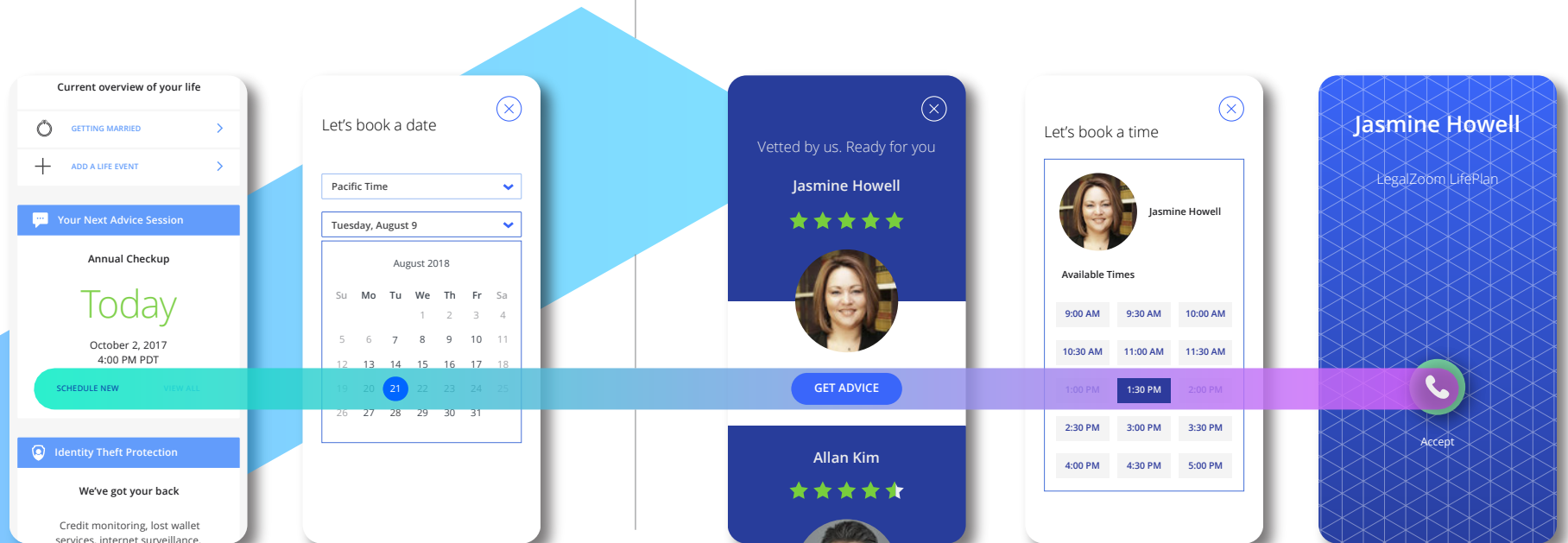
- Create a living will for 2 people
- Annual legal check up
- Legal document review
- Access to over 170 legal forms
- 10% off selected LegalZoom products

How it works

Our attorney network covers every state and multiple subject matters: personal injury, bankruptcy, family law, property...the list goes on. When choosing an attorney, read reviews from previous members, then pick a date and time that works for you.

Prepare for your session by gathering any necessary documents and compiling some questions, and they'll give you a call.

Each session typically lasts 20-30 minutes, and you can talk to them about any new legal matter that comes up during the year.



Estate planning

Why you need it

There are quite a few misconceptions around estate planning—it's only for super wealthy people, it's too difficult, it costs too much. In reality, an estate plan is just a few legal documents that set out your wishes in the case you pass away or become unable to manage things on your own. It's for everyone, and LifePlan makes it pretty simple.



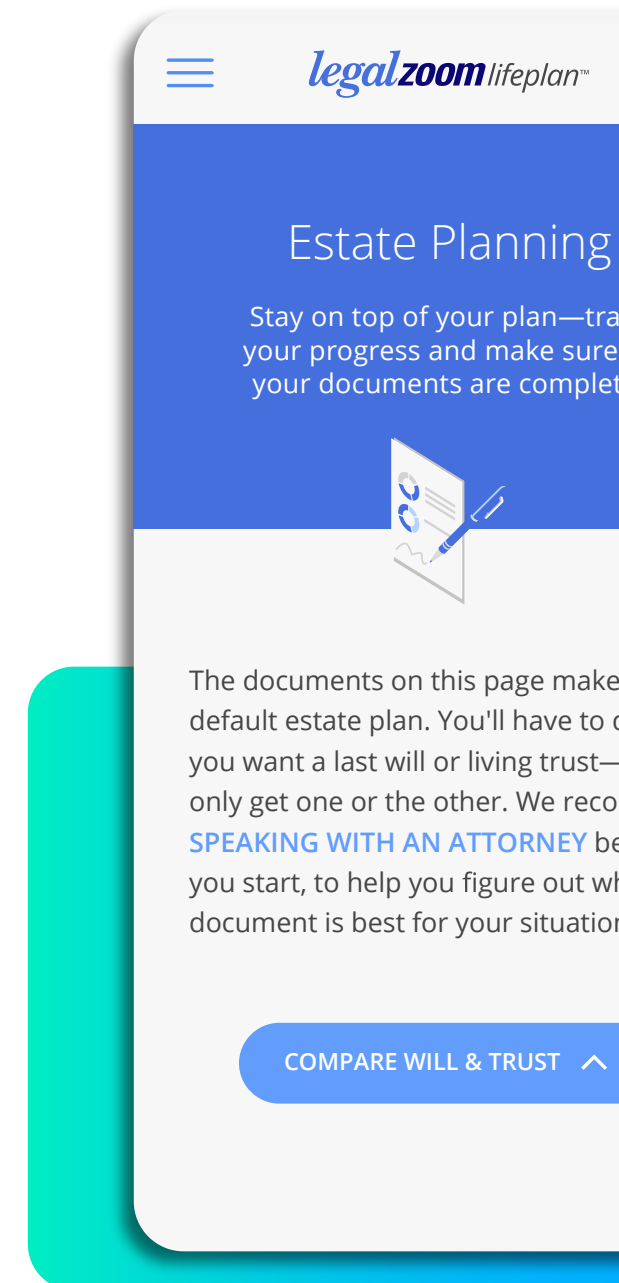
What's included

The typical estate planning documents are a will or trust, a power of attorney, and a living will, each of which are included with LifePlan for you and a loved one.

You can create each document online with the help of an independent attorney—all included in the price of your plan. And, if anything changes while you're a member—you have children, you buy a home, you get divorced—making changes/updates to your will is completely free.

How it works

Just log in, head to the estate planning page, and create each document using our online forms. If you're not sure which documents are right for you, just schedule an attorney advice session.



COMPARE WILL & TRUST >

The documents on this page make up our default estate plan. You'll have to decide if you want a last will or living trust—you only get one or the other. We recommend [SPEAKING WITH AN ATTORNEY](#) before you start, to help you figure out which document is best for your situation.

COMPARE WILL & TRUST ^

	Will	Trust
Specify your last wishes and appoint someone to carry them out.	✓	✓
Simple because it requires minimal paperwork and legwork to create.	✓	
Avoid PROBATE (which is a public court-ordered procedure that can be costly and time consuming depending on where you live).		✓
Free with your membership	✓	✓



1st Living Will

CONTINUE



2nd Living Will

START

Living Will

Also known as an advance directive.

Make your own decisions about life support and organ donation in advance. Name someone to manage your healthcare when you're unable to.

A living will helps you prevent confusion or disagreements about what healthcare you prefer. Your wishes are in writing, giving your loved ones the guidance they'll need.

[MAKE YOUR ESTATE PLAN OFFICIAL](#)



1st Power of Attorney

REVISE



2nd Power of Attorney

CONTINUE

Power of Attorney

Also known as a durable power of attorney.

Name someone to make important legal and financial decisions if you're unable to.

With a power of attorney in place, you know a person of your choosing will manage your finances and legal matters if you can't. A power of attorney is also a cheaper and less stressful alternative than being forced to go to court to get someone appointed.



You're not done yet!

Once all of your documents are ready to finalize, follow these steps to make sure your estate plan is legally binding.

1 Attorney review

Go over each document with one of our attorneys to make sure your wishes are reflected and everything looks accurate.

[SCHEDULE REVIEW >](#)

2 Revise

Make any necessary revisions

Free with your membership ✓

[WATCH OVERVIEW](#)

Still need help deciding? [SCHEDULE ADVICE SESSION](#)



1st Last Will & Testament

REVISE



2nd Last Will & Testament

REVISE

VIEW

WILL TRUST

Last Will & Testament

Also known as a will.

Specify your last wishes and appoint someone to carry them out.

Indicate who will receive your assets after you're gone and specify when they receive them.

[MAKE YOUR ESTATE PLAN OFFICIAL](#)

WILL TRUST

Living Trust

To switch to a living trust, you'll have to call our membership advisor team at (888) 556-0888. They're available Mon-Fri 7am-7pm CT.

A last will & testament is the default document included with your plan.

[MAKE YOUR ESTATE PLAN OFFICIAL](#)



1st Living Trust

REVISE



1st Living Trust

START

WILL TRUST

Living Trust

Also known as a revocable trust.

Place most of your assets into a trust during your life. Pass assets without going through probate. Control when your beneficiaries receive assets.

A living trust is beneficial because it allows you to pass on property avoiding costs and delays associated with probate.

[MAKE YOUR ESTATE PLAN OFFICIAL](#)



1st Living Will



2nd Living Will

Living Will

Also known as an advance directive.

Make your own decisions about life support and organ donation someone to manage your healthcare when you're unable to.

A living will helps you prevent confusion or disagreements about

Identity theft protection

Why you need it

Monitoring your credit is great, but what about all of your other personal information? It's important to keep an eye on everything that's out there, so if something does happen, you're notified to take action.



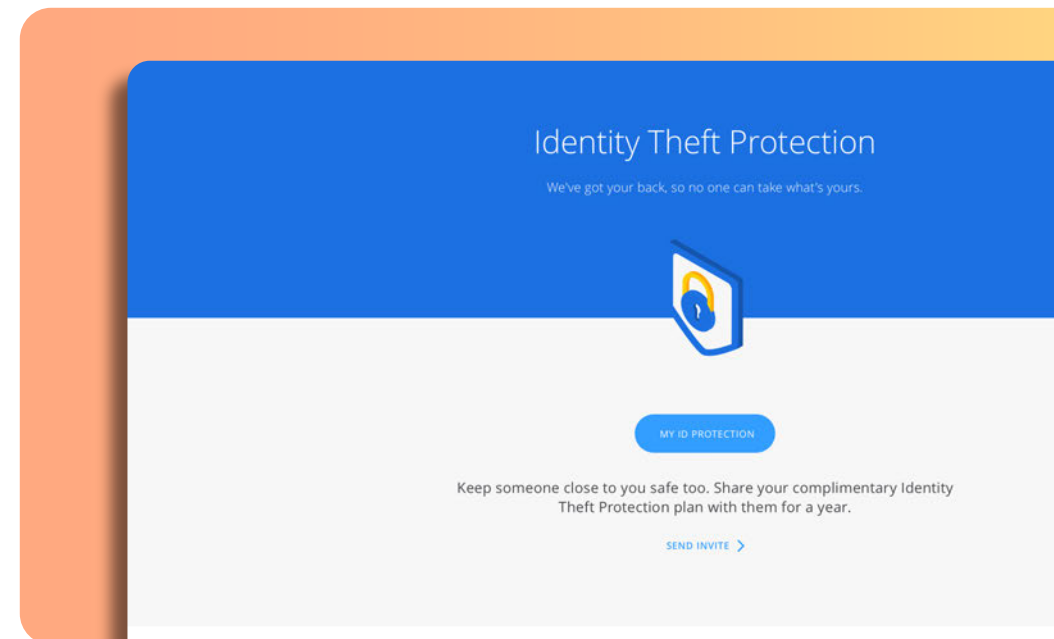
What's included

Protect all of your info—from social security numbers to bank accounts—with your LifePlan identity theft protection. Coverage includes :

- Full Service Restoration
- Internet/Black Market Website Surveillance
- Lost Wallet Protection
- 1 Bureau Credit Monitoring (w/Experian)
- \$1M Identity Theft Insurance
- Stolen Funds Reimbursement

How it works

Just log in, head to the Identity Theft page, and take a few minutes to set up the accounts you want to be monitored. Once it's running, you'll be notified immediately when there's an issue with one of your accounts. And, if your identity is compromised, a professional will guide you through the process and assist you in contacting creditors, banks and law enforcement.



Contact

If you'd like to learn more about LifePlan or have any questions, please get in touch



lifeplan.legalzoom.com



lifeplan@legalzoom.com



(855) 787-1909
Mon-Fri 7am-7pm CT



LifePlan Specifications

Independent Professional advice



Financial Advice

Unlimited 30 minute sessions with our Certified Financial Planners. Assess your current financial situation, set goals and start taking steps to achieve them. Topics for discussion include: retirement planning, managing daily finances, homeownership, debt payoff, college savings planning, divorce planning, annual financial assessment.

Tax Advice

Unlimited 30 minute sessions (on new tax matters) with our independent tax professionals. Review your deductions, discuss upcoming filings and more.

Legal Advice

Unlimited 30 minute advice sessions (on new matters) from our network of independent, vetted and customer reviewed attorneys. Get 25% off of any additional services provided by our network of attorneys, in the event a network attorney is retained. Topics for discussion include: family matters, elder matters, real estate matters, consumer protection.

Insurance Advice

Unlimited 30 minute insurance advice sessions with an independent insurance professional. Shop for coverages and compare rates to make sure you have what's best for your situation.

Identity theft protection for two



Full Service Restoration

Service that provides compromised Subscribers with a certified identity theft restoration specialist to provide full-service identity restoration. Full-Service Identity Restoration. Services includes:

- A certified identity theft restoration specialist assigned to identity fraud victims to provide full-service identity restoration over the duration of the case
- Use of a specialized limited power of attorney to work on the Subscriber's behalf to restore the identity case, which frees them from that burden
- Interactive dispute letters to creditors and government agencies
- Interactive dispute letters to credit bureaus
- Interactive identity theft affidavit

If a subscriber experiences identity abuse or breach, a dedicated restoration specialist to guide through the entire process, even helping to contact creditors, banks and law enforcement. Your dedicated specialist works on your case for as long as it takes to make things right. Full Triage on the First Call with Live Access to 3B Credit Data, Cyber, NCOA, Court/Criminal, PayDayLoan, Sex Offender Data..., Restore Existing Theft with LPOA and FTC Affidavit, CITRMS Certified Specialist, 24x7x365 availability, Prevent Future Loss with Credit Bureaus, Financial Institutions, and Government Agencies.

Internet/Black Market Website Surveillance

A proprietary Internet surveillance technology that monitors activity on the Internet to see if personal information is being traded and/or sold online. The technology searches networks, chat rooms, and websites worldwide for stolen identity credentials, finding Subscriber data regardless of nationality or location. It will notify the subscriber if their information is found being illegally traded or sold online, and provides clear instructions on what to do next. The data that can be monitored includes: email addresses, Social Security Number, Phone Numbers, Credit/Debit Cards, Bank Accounts, Driver's License Number, Passport, Store/Membership Cards, Medical ID Numbers.



Lost Wallet Protection

Lost Wallet Services provide Subscribers protection for personally identifiable information that has been compromised. Services include:

- Protection for credit cards, debit/ATM cards, checkbooks, driver's licenses, Social Security cards, insurance cards, passports, military identification cards, traveler's checks and Medicare/Medicaid identification
- Support from restoration specialists in canceling and reissuing documents due to lost or stolen wallet or identity documents and information compromised outside of the lost wallet event"

1 Bureau Credit Monitoring (w/Experian)

Unexpected changes to your credit reports can be a sign of identity theft. Credit monitoring tracks activity on a subscriber's credit reports at one, two, or all three of the major credit reporting agencies (CRAs) — Experian, Equifax and TransUnion. Usually, credit monitoring will alert when: a company checks credit history, a new loan or credit card account is opened, a creditor or debt collector says payment is late, public records show bankruptcy has been filed, there is a legal judgment, credit limits change, personal information, like name, address, or phone number, changes. Credit monitoring only warns about activity that shows up on the credit report. It won't catch other types of identity theft. For example, credit monitoring won't tell if an identity thief withdraws money from a bank account, or uses an Social Security number to file a tax return and collect the refund.

Stolen Funds Reimbursement

Provides reimbursement coverage for lost funds up to covered amount (up to \$25K, \$100K or \$1M), including fraudulent bank and investment account withdrawals or tax returns filed in the subscriber's name.

An estate plan for two



Last Will and Testament A last will and testament is a legal document that lets you, the testator (the person making the will), designate individuals and/or charities to receive your property and possessions when you pass away. These individuals and charities are commonly referred to as beneficiaries in your last will. A last will also allow you to name a guardian to care for minor children. The main purpose of a will is to ensure that the testator's wishes, and not the default laws of the state, will be followed upon the testator's death.

or

Living Trust It's a legal document that states who you want to manage and distribute your property if you're unable to do so, and who receives it when you pass away. Once signed, you transfer ownership of your assets into the trust and you remain in complete control of your property. The trust property can be managed and distributed without going through the probate court.

and

Living Will (Advance Healthcare Directive) A living will, commonly referred to as an advance directive, is a document that provides instructions regarding end-of-life care, including whether a person wants life support under certain circumstances. It also helps prevent confusion about the type of care you do or do not want if you can't communicate your wishes. Without a living will, those types of decisions are made without specific guidance from you. Included with a Living Will is a health care power of attorney, which is a document in which you designate someone to be your representative, or agent, in the event you are unable to make or communicate decisions about all aspects of your health care. Without a healthcare power of attorney, your state's laws will determine who will make healthcare decisions for you if you are unable to.

and



Financial Power(s) of Attorney A power of attorney (POA) is a legal document that lets you appoint someone to handle financial and legal matters on your behalf. The person authorizing the other to act on their behalf is often referred to as the principal. The person authorized to act is called the agent or attorney-in-fact. With a durable power of attorney, the person you appoint will be legally permitted to take care of important matters for you, including paying your bills and managing your investments, if you are unable to do so for yourself.

Document review



Legal document and contract review

Legal documents up to 10 pages in length can be reviewed by an independent attorney with your LifePlan Membership. For longer documents, an additional flat fee is applied:

- 11-15 page documents: \$39
- 16-25 page documents: \$99
- 26+ page documents: Attorney will contact you to agree on a price (which will include your 25% discount)

Annual legal check up



Annual legal Check Up

Once during each membership year, the Primary Member shall be entitled to a legal check-up (the "Legal Check-Up"). The Legal Check-Up is intended to provide the Primary Member with an (a) assessment of his or her legal profile and recommendations based on significant issues or gaps or (b) update of a previous Legal Check-Up considering changes in life, circumstances, legal profile, and applicable law. The Legal Check-Up shall include a telephone consultation, during normal business hours, of up to one (1) hour to discuss the Primary Member's legal portfolio, potential updates over the previous year, and other recommendations. The Firm shall provide a written summary of the consultation, including any recommendations regarding the Primary Member's legal documents or strategies. The Legal Check-Up is available to a Primary Member only after six (6) months of continuous membership in LifePlan.

10% off



Discount

10% off on the following LegalZoom products:

Forming Your Business

- LLC (Limited Liability Company)
- Incorporation (S-Corp, C-Corp)
- Nonprofit
- LP (Limited Partnership)
- LLP (Limited Liability Partnership)

Naming Your Business

- DBA / Fictitious Business Names
- Entity Name Availability Check
- Entity Name Reservation
- Trademark a Business Name

Tax, Licenses and Permits

- Federal Tax ID (EIN)
- State Tax ID
- 501(C)(3) Application
- Business Licenses
- Seller's Permit

Business Changes and Filings

- Amendments
- Dissolution
- Foreign Qualification
- Conversion

Business Compliance

- Annual Reports
- Initial Reports
- Minutes Manager
- Compliance Calendar
- Operating Agreements
- Bylaws & Resolutions
- Work Visa

Additional Business Services

- Corporate Supplies
- Certified Copies
- Certificates of Good Standing
- Registered Agent Services

Trademarks

- Trademark Registration
- Trademark Search
- Trademark Monitoring
- Trademark Statement of Use
- International Trademark Filing

Patents and Copyrights

- Provisional Application for Patent
- Patent Search
- Utility Patent
- Design Patent
- Copyright Registration

Real Estate

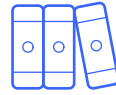
- Real Estate Lease
- Property Deed

Personal Services

- Bankruptcy
- Green Card
- Personal Injury
- Name Change
- Prenuptial Agreements
- Pet Protection Agreement
- Disability Benefits
- DUI / DWI



Legal forms library



Legal Forms Library

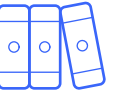
Access to 170+ legal forms and agreements:

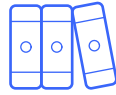
Legal Forms and Agreements

1. Academic letter of recommendation
2. Acknowledgement of customer complaint
3. Adverse action disclosure letter
4. Affidavit of lost promissory note
5. Affidavit of lost promissory note and indemnity agreement
6. Affidavit of lost stock certificate
7. Affidavit of lost stock certificate and indemnity agreement
8. Agency agreement
9. Amendment of agreement
10. Applicant rejection letter
11. Arbitration agreement
12. Artwork release
13. Assignment of agreement
14. Assignment of commercial lease
15. Assignment of residential lease
16. Band partnership agreement
17. Bill of sale automobile
18. Bill of sale automobile with promissory note
19. Bill of sale boat with warranty
20. Bill of sale cat
21. Bill of sale dog
22. Bill of sale quitclaim
23. Bill of sale with warranty
24. Bills of sale
25. Breach of contract notice
26. Business letter of recommendation
27. Business plan nondisclosure agreement
28. California general affidavit
29. California partial release and waiver of liens conditional
30. California partial release and waiver of liens unconditional
31. California release and waiver of liens on full payment conditional
32. California release and waiver of liens on full payment unconditional
33. Catering services agreement
34. Certification of cease and desist

Legal Forms and Agreements

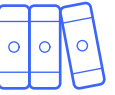
35. Cohabitation agreement
36. Commercial rental application
37. Computer email and internet usage policy
38. Consent to drug testing
39. Consignment agreement
40. Consulting services agreement
41. Continuing guaranty limited amount
42. Continuing guaranty unlimited amount
43. Copyright assignment
44. Copyright license agreement artwork
45. Copyright license agreement written work
46. Debt settlement agreement
47. Demand for full payment on installment promissory note
48. Demand for payment on demand promissory note
49. Direct deposit authorization
50. Distribution agreement commission based
51. Dog walking agreement
52. Domain name cease and desist letter
53. Domain name sale agreement
54. Earnest money promissory note
55. Employee absence report and summary
56. Employee agreement
57. Employee handbook acknowledgement
58. Employee nondisclosure agreement
59. Employee review
60. Employee separation checklist
61. Employee termination letter
62. Employee written warning
63. Employment application
64. Employment offer letter
65. Entertainment sponsorship solicitation.html
66. Equipment lease agreement
67. Exclusive purchasing agency agreement
68. Exclusive sales representative agreement
69. Extension of agreement
70. Final invoice





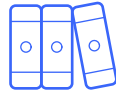
Legal Forms and Agreements

71. Florida general affidavit
72. General agreement
73. General contractor agreement
74. General contractor agreement cost plus fee
75. Illinois general affidavit
76. Independent contractor agreement
77. Independent contractor application
78. Independent contractor unilateral nondisclosure agreement
79. Intellectual property assignment
80. Job acceptance letter
81. Job offer rejection letter
82. Joint venture agreement amendments
83. Land co ownership agreement
84. Landlord consent to assignment
85. Landlord consent to sublease
86. Landlord tenant
87. Landlord welcome letter
88. Landlords letter returning security deposit
89. Late payment collection letters
90. Lead warning and disclosure statement
91. Letter of intent for business transaction
92. Letter of resignation
93. Location release
94. Management services agreement
95. Model release adult
96. Model release for minors
97. Motorcycle bill of sale
98. Move in move out checklist
99. Mutual nondisclosure agreement
100. Mutual rescission and release
101. Nonexclusive purchasing agency agreement
102. Nonexclusive sales representative agreement
103. Notice of default on installment promissory note
104. Notice of dissolution of partnership debtors and creditors
105. Notice of returned check
106. Notice to pay rent or quit



Legal Forms and Agreements

107. Online advertising agreement
108. Partnership dissolution agreement
109. Patent application assignment
110. Patent assignment
111. Performance agreement
112. Permission to reprint published material
113. Permission to reproduce images
114. Personal management agreement
115. Pet custody agreement
116. Pet sitting agreement
117. Photography services agreement
118. Product supply agreement
119. Promissory note secured amortized payments
120. Promissory note secured demand
121. Promissory note secured installment with balloon final payment
122. Promissory note secured interest only with balloon final payment
123. Promissory note secured lump sum payment
124. Promissory note unsecured amortized payments
125. Promissory note unsecured demand
126. Promissory note unsecured installment with balloon final payment
127. Promissory note unsecured interest only with balloon final payment
128. Promissory note unsecured lump sum payment
129. Property management agreement
130. Purchase receipt
131. Release and authorization to use voice and/or likeness
132. Release of credit information employee
133. Release of information employee
134. Release of promissory note
135. Rent receipt
136. Request for permission to reprint published material
137. Request for permission to reproduce images
138. Research and development agreement



Legal Forms and Agreements

139. Residential rental application
140. Sale of goods agreement
141. Screenplay collaboration agreement
142. Security agreement
143. Service related agreements
144. Software distribution agreement
145. Specific guarantee
146. Sponsorship agreement
147. Sponsorship commitment
148. Sponsorship fee invoice
149. Sponsorship solicitation letter
150. Sublease of residential lease with landlord consent
151. Submission release
152. Talent release adult
153. Talent release for minors
154. Termination of agreement and release general
155. Termination of lease
156. Texas general affidavit
157. Trademark assignment
158. Trademark cease and desist
159. Trademark license agreement
160. Unilateral nondisclosure agreement
161. Videography services agreement
162. Waiver of default loan
163. Website affiliate agreement
164. Website development agreement
165. Website hosting agreement
166. Website maintenance agreement
167. Wedding planning services agreement
168. Whistleblower protection policy
169. Wireless device usage policy
170. Work made for hire agreement
171. Workplace injury and illness incident report



Coverage

Who is covered under LifePlan

- Primary Member
- The Primary Member's spouse or domestic partner;
- Any dependent who is under the age of 26;
- Any dependent child, regardless of age, who is incapable of sustaining employment by reason of mental or physical disability; and
- Any dependent individuals living in the Primary Member's home such as a parent or grandparent.