

# Legal and Financial Services

Employees and family members are eligible to receive legal and financial consultation for an unlimited number of issues at no cost. 24/7 access is also available to a secured site for information, resources and personal documents.

## Legal Services

Support is available for any legal need including:

- Document Preparation
- Civil/Consumer/Criminal Issues
- Domestic/Family Disputes
- Real Estate
- Landlord/Tenant
- Motor Vehicle
- Immigration
- Estate Planning
- Will Preparation

Services include initial assessment and phone consultation regarding the issue. If additional assistance is needed and the attorney is retained, the employee or family member will receive a **25% discount on continued services**.

## Financial Services

Support is available for any financial need including:

- Referrals to CPAs, CFPs and Credit Counselors
- Credit Counseling
- Debt Management
- Retirement
- Lease/Purchase Issues
- College Funding
- Financial Planning
- Tax Preparation

Services include initial assessment and phone consultation regarding the issue. Employees and family members receive **30-Day Financial Coaching** and a **90-Day Financial Wellness Action Plan** at no cost. If additional assistance is needed, financial coaching can continue for a monthly fee.

## Document Preparation

Tools and resources are available for multiple legal and financial needs including:

- Will Preparation
- Complaint Letters
- Deeds
- Living Trusts
- Personal Service Agreements
- Home Financing
- Personal Financing
- Investment
- Retirement
- Leases

Services include **Do It Yourself** document preparation through the Online Legal and Financial Resource Center, as well as **Document Assistance** services at a reduced fee.

**Request legal and financial services by calling the EAP toll-free at 800-932-0034.**

Call toll-free:  
**800-932-0034**  
text: **858-224-2094**  
email: [eapinfo@acispecialtybenefits.com](mailto:eapinfo@acispecialtybenefits.com)

