



## Legal and Financial Services

WorkLifeMatters, an Employee Assistance Program, through Integrated Behavioral Health (IBH), provides a range of legal and financial services to eligible members to help with issues related to:

- Budgeting
- Civil/Consumer Issues
- Criminal Matters
- Debt/Credit Counseling
- Estate Planning Law
- Financial Services
- Immigration
- IRS Matters
- Motor Vehicle
- Personal/Family Issues
- Real Estate
- Tax Preparation
- And more!

### Financial services

Employees can receive telephonic consultations with seasoned financial professionals and certified public accountants (CPA). Unlimited telephonic counseling, and 30 days of financial coaching is available. Local referrals are available for more complex financial planning issues, such as: credit counseling, debt and budget assistance, basic tax planning, and retirement and college planning questions.

### Legal services

Employees can receive an initial 30 minute office or telephone consultation with an attorney. Plus, if the attorney is retained to provide legal services, the member can apply a 25% discount off the attorney's normal hourly rate on legal fees. Virtually all types of legal matters are eligible for these services.

### Assistance with document preparation

A simple and inexpensive online process enables members to complete their own legal document preparation from home. This eliminates the cost of an attorney or dealing with lengthy completion and delivery periods!

### Dedicated legal/financial website

Each member is provided with unlimited access to a dedicated legal/financial website, which includes legal and financial tools. Examples include legal and financial forms, financial calculators, helpful articles and answers to frequently asked questions.

### Employee program highlights

- Assistance with a wide range of legal and financial services
- Complimentary consultations with financial and legal professionals — plus discounts on legal services
- Simple and inexpensive legal document preparation available online
- Unlimited access to a dedicated website



[ibhworklife.com](http://ibhworklife.com)

1 800 386 7055

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New York, NY  
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