

Estate Planning

Resources and Guidance for Preparing a Will



If you're planning for the future or thinking that it may be time to draft a will, LifeWorks has resources to support you. Depending on your situation, you may or may not need to hire a lawyer to prepare a will.

Legal Consultation and Local Attorney Referral

- LifeWorks can refer you to a licensed attorney for a free, 30-minute telephonic consultation. If you require legal representation and retain an attorney from our network, you may be eligible to receive a discount off retainer fees. For legal referrals contact LifeWorks toll-free 24/7 at **877-849-6034**.

Document Preparation

- A free online tool that provides valuable information and guidance on drafting legal forms.

Legal Library

- An easy-to-browse legal library with hundreds of articles, answers to FAQs, and legal information.

How to Access Online Will Preparation

1. Visit login.lifeworks.com (Username: LFG Password: resources)
→ Scroll down to **Quick Links**, click on **Legal Resources** then click on **Legal Forms**.
2. Now that you are in the Legal Resource Center, click on **Personal Documents** and select your resident state.
→ Scroll down to find related documents in the sections titled, **Changing a Will and Wills**
→ Click on **Get Started** for information about the document, then click **Start Now**.
3. You will be prompted to register; this is required to access legal documents and the My Document tool.
→ Click on **Register Now** and enter the required information, review the terms, and click Register.
4. A new tab will open, introducing **Rapidocs** with detailed, step-by-step "How to Use" instructions.
→ Rapidocs will ask a series of questions to assist in creating your legal document.
→ Monitor your progress as you move through the questionnaire.
5. **Out of time?** You can come back any time to finish or edit your legal document.
→ Documents are saved and accessible in the **My Documents** tool and can be exported in Word or PDF format.