

Legal and Financial Services

Legal Services

UTEAP delivers a legal benefit that focuses on preventing legal problems. However, help is available when you need it. Services include:

- An unlimited number of initial consultations per year on each new legal topic or matter. This initial consultation with an attorney can be by telephone or in person. The attorney provides up to one half hour for an initial consultation under the plan.
- For more complex legal issues, guaranteed 25% reduced hourly rates if you use plan attorneys.
- A “simple will” kit.
- Covered matters include, but are not limited to: contract and property disputes, personal liability and consumer rights, separation and divorce, child support and custody, auto accidents, identity theft.

Financial Services

Finances concern everyone – at every stage of life. With your UTEAP Financial Benefit, you have access to financial experts as well as tools, worksheets, resources, and information online. Services include:

- A free, confidential telephone session with a financial counselor for up to three separate financial issues per year.
- Credit counseling, debt management and budgeting advice.
- Information on how to prevent and fix any incidents of identity theft.
- Retirement and college planning.
- Answers to general questions on taxes, investments, and insurance.
- And other matters, including: home buying, mortgages, retirement funds, rollovers and transfers from retirement accounts, and more.

To take advantage of any of the above services, simply call our office at (800) 346-3549.



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