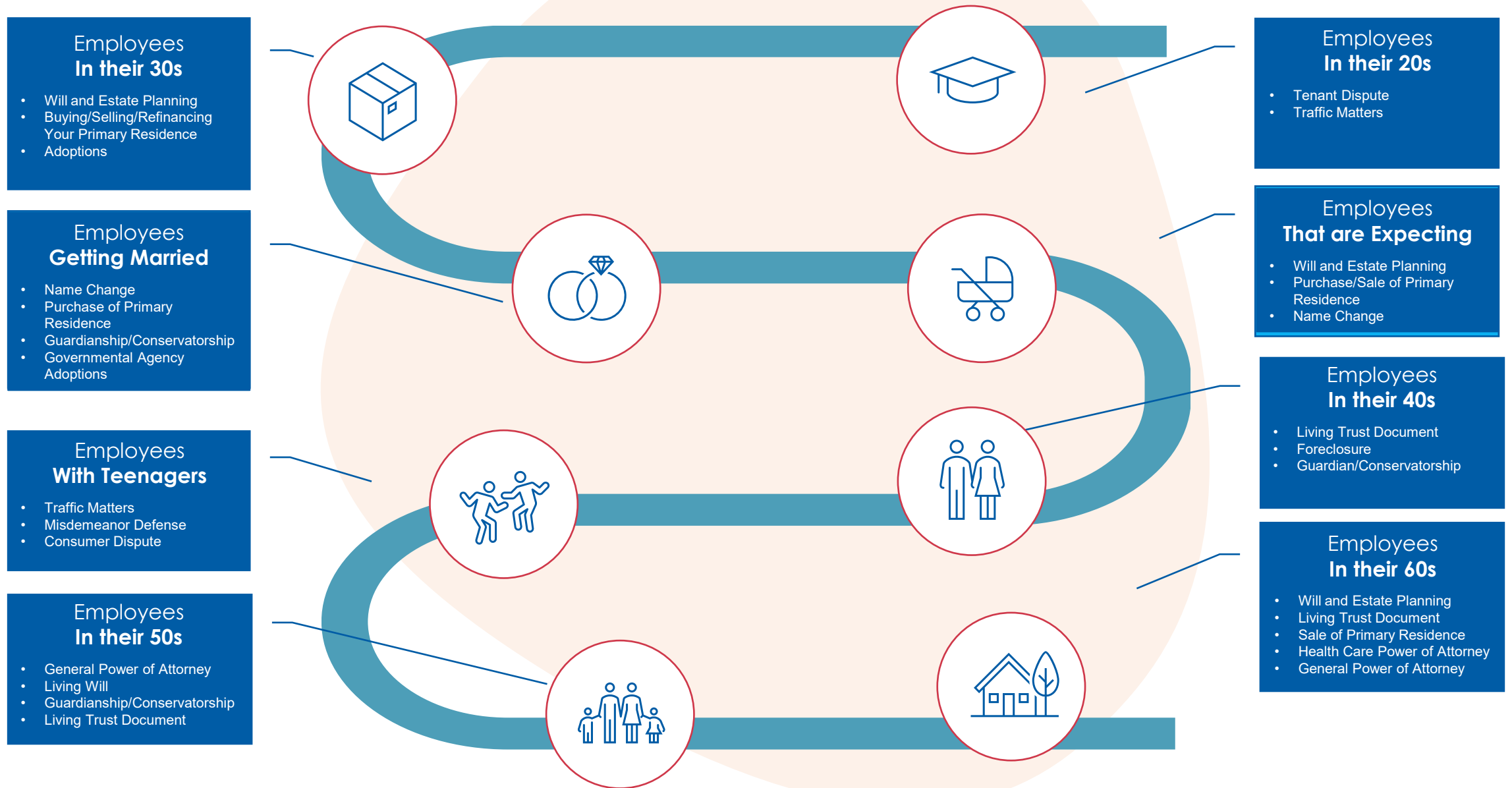


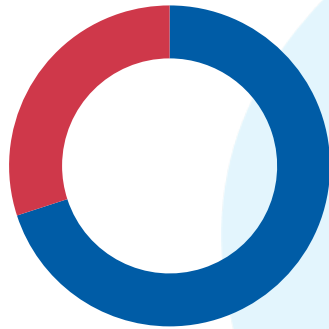


LegalEASE Service Overview

A Legal Benefits Plan Can Assist During Life Events

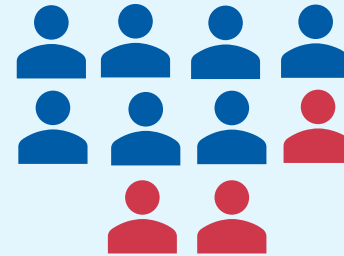


The Numbers



■ Affected ■ Total employees

Over **70%** of people will have the need for a lawyer in the next 12 months.¹



■ Affected ■ Total employees

More than **70%** of those needing an attorney in the next 12 months don't know how to tell a good lawyer from a bad one.²

An Attorney charges on average **\$200 - \$400** per hour³.

What non-members can expect to pay:

$$\begin{array}{l} \text{Retainer Fee} \\ \$5,000 \text{ to } \$25,000 \end{array} + \begin{array}{l} \text{Litigation Fees} \\ \$10,000 \text{ to } \$50,000 \end{array} = \text{\$15,000 to \$75,000 total cost to Employee}$$

On average, it costs **\$400 - \$700** to create a will⁴.

^{1,2} Source: American Bar Association

³ Source: [Thervo](#)

⁴ Source: [Ameristate](#)

The Work of Finding an Attorney

The work of finding an attorney

- Numerous attorney searches
- Voicemails left with attorneys with no returned calls
- Attorneys' practice of prioritizing legal matters causes minor matters to be ignored
- Days pass with deadlines without speaking to an attorney
- Multiple days off taken to interview potentially compatible attorneys
- Lack of "compatibility" app to help employee decide which attorney fits their needs
- Little online ratings information
- Ratings information is skewed by "win/loss" client experience
- Employees speak to an average of 7 attorneys
- No advocate to ensure that the attorney/client relationship remains compatible

Challenges

Access to Attorney

- Employees don't personally know any attorneys
- Employees aren't sure how to locate the right attorney
- As many as 40% of the Members **could not connect or find the right Attorney**

Difficult to Reach

- Attorneys are not sitting in office:
- Attorneys are in court/depositions/meetings/ on vacation
- As many as 40% of the Members **could not access available benefits**

Understanding Areas of Law

- Employee don't always know the right attorney in the right area of law
- Results in Employee's Conducting numerous attorney searches/calls

Selecting an Attorney

- Takes days for an employee to interview potentially attorneys
- LegalEASE offers help and follow-up to assist your employee's in connecting to the attorney

HOW CAN WE HELP?



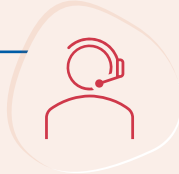
What you get with A LegalEASE Insurance Plan

Benefits of LegalEASE Plan

- ✓ Coverage for in and out-of-network
- ✓ Concierge assistance navigating common legal issues
- ✓ Two options to connect with an Attorney - over the phone and online

Advocacy
Help During
the Entire
Legal Matter

Member Focused Care



- ✓ Live Concierge Matching with dedicated Member Specialists
- ✓ 98.1% connection success to an Attorney
- ✓ We match Attorneys to your preference and needs including everything from LGBTQ to gender and religion



The LegalEASE Way

Live/Phone Concierge

- ✓ Live Concierge Matching with dedicated Member Specialist
- ✓ We match Attorneys to your preference and needs including everything from LGBTQ to gender and religion

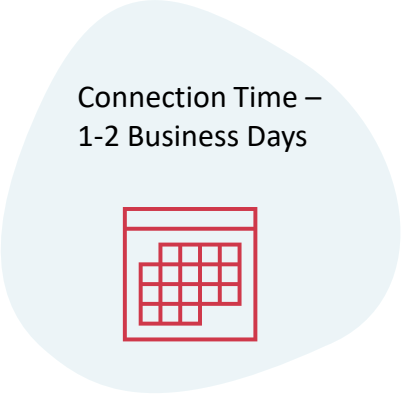


Importance of Connection

Best Match First Time



Connection Time –
1-2 Business Days



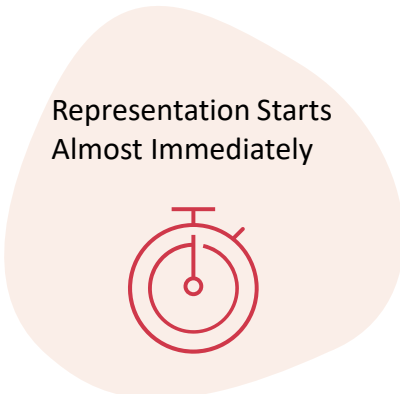
No Attorney-after-
Attorney Missteps



No Wasted Time –
Less Stress



Representation Starts
Almost Immediately



Our Attorney Network

Benefits of a LegalEASE Plan

- An attorney with expertise specific to your legal matter
- Access to a national network of attorneys with exceptional experience that are matched to meet your needs

Our Vetting Process

- ✓ Board-Certified Examination
- ✓ State-Licensed – Locality of Member
- ✓ Examine their Law Practice History
- ✓ 13 Question Background Certification
- ✓ Community/Law Practice Record
- ✓ Review of E&O/Discipline Record
- ✓ Penalty of Perjury Submissions
- ✓ Insurance Requirement
- ✓ **10 years of Attorney Experience**
- ✓ Professional Conduct Code

- 20,300+ Attorneys
- 14,000+ Law Firms
- 23 mi. Radius



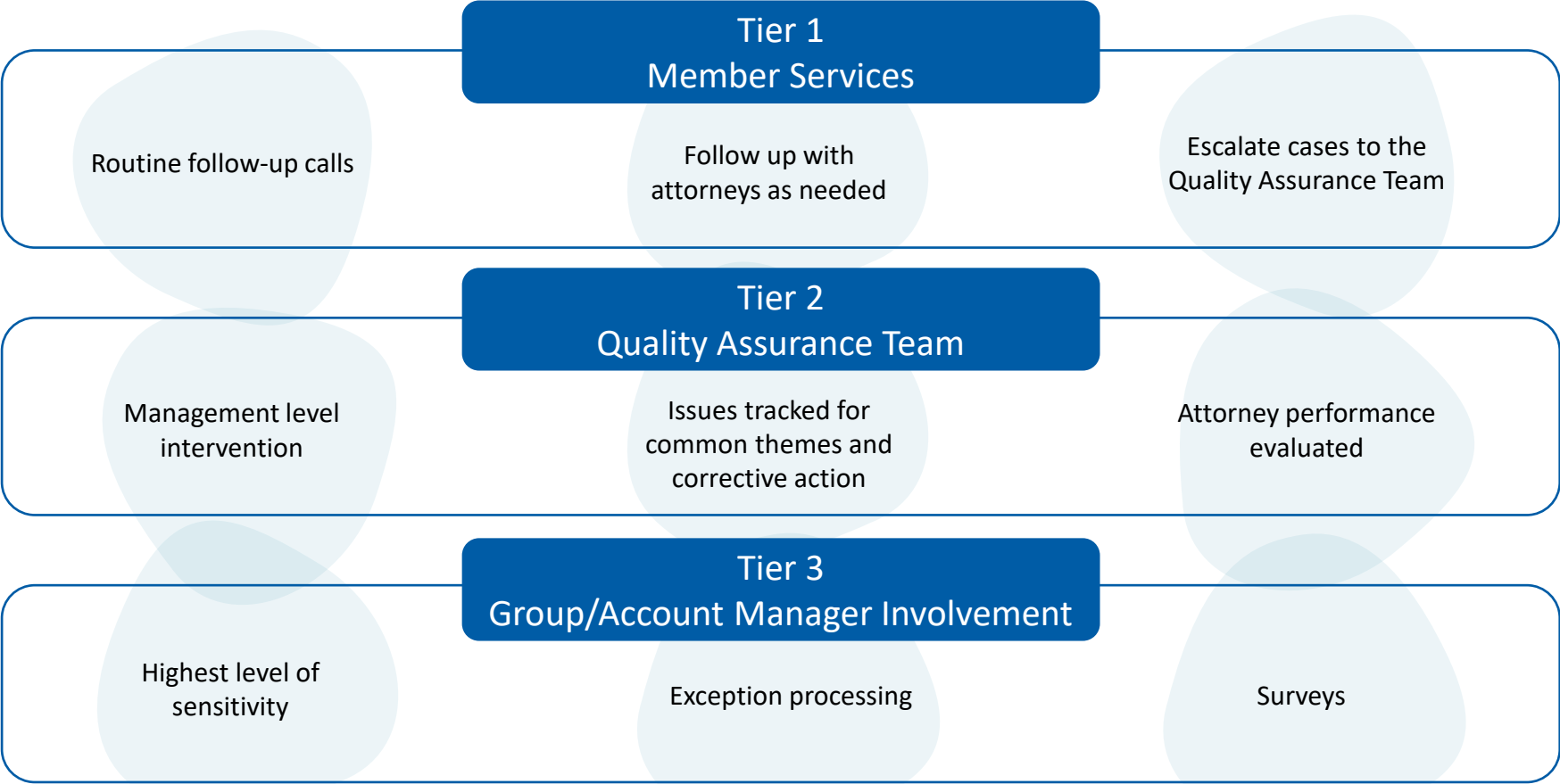
With over 20,300 Attorneys in our network, we are the **largest U.S. provider**

Attorneys are interviewed and pre-screened before matching them to a member.

A photograph of a woman with curly hair smiling down at a man who is laughing joyfully. The image is split vertically, with the left side showing the full scene and the right side being a faded, semi-transparent version of the same scene. An orange rectangular overlay is positioned on the right side, containing the text "QUALITY ASSURANCE" in white, uppercase, sans-serif font.

QUALITY ASSURANCE

Quality Assurance Process



We Ask Every Member for Feedback at Every Touchpoint

RESOURCES



Communications to Increase Utilization & Enrollment

Email Communication

Flyers

Microsites

Webinars

Break Room Posters

Mid-Year Presentations

Open Enrollment Presentations

Digital Signage

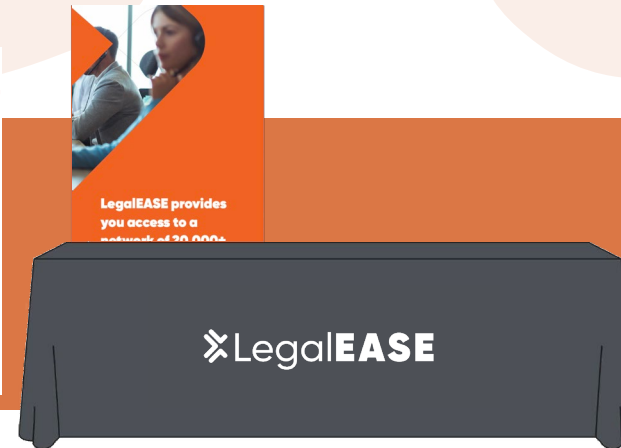
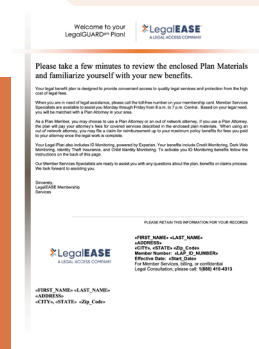
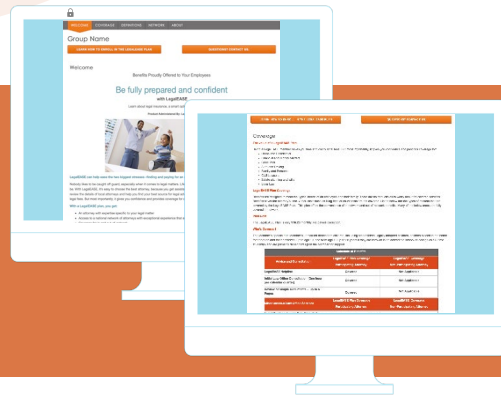
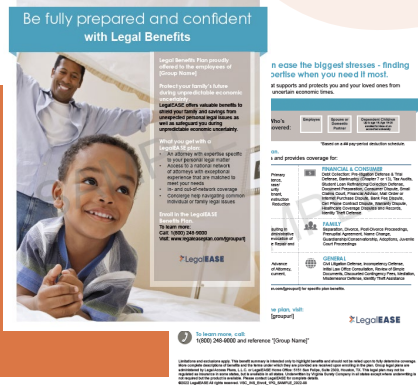
Fulfillment Communications

Benefit Fair Presence

Materials customized specifically for your employees and for your specific plan

Personalized email and Benefits Guide

Co-branding opportunity



Employee Seminars

2023 Legal Seminars

Topics include:

- Family Law Issues
- Wills, Trusts & Estate Planning
- Eldercare Issues
- Steps to Buying or Selling a Home
- Do you need a prenuptial agreement?
- A New House: To Buy or Not to Buy
- Renters – Before Signing a Lease

Benefits of Seminars

- Educational information for all employees
- Increases probability for employees to take steps in their legal and financial health
- Provides an environment for employees to ask general questions
- Increases utilization in the LegalEASE plan
- Increases enrollment in the LegalEASE plan



Financial Seminars

1 Hour Seminars with Q&A! No stress set up!

Topics include:

- A Guide to Teaching Financial Responsibility
- Balancing life today and dreams of tomorrow
- College resources: Paying for College
- Creating your retirement paycheck: Strategies to help you live the life you've earned
- Divorce changes everything: Find your independence

Additional Resources Through Our Portal – The Legal Corner

Sample Documents

View and download PDF sample documents like joint revocable living trust, last will and testament, declaration regarding final arrangements, contract for a rental agreement, contract with an independent contractor and many more.

Legal Eagle Videos

A fun take on popular events in the eyes of a lawyer.

Articles on Areas of Law

View legal resource articles around rules and procedures in categories like auto and traffic, estate planning, consumer matters, home and residential matters.

Topical Sections

Such as Women's Law, Children's Law, Sports Law and updated Supreme Court News.

LegalCORNER

REGISTER LOG IN

HOME RESOURCES

Importance of Estate Planning
You want to leave assets behind to your beneficiaries but should you setup a Will or a Trust? Which is better for you and your situation?
LEARN MORE

THE LEGAL CORNER

Welcome to the LegalEASE Legal Corner. To search for an attorney, please begin by clicking "Register" or "Log In".
The Attorney Search Directory is available for your use during the pandemic. The use of the attorney search directory does not infer any benefit coverage, reimbursement or insurance. Please contact member services to confirm benefit eligibility and coverage levels.

QUICK RESOURCES

Sample Joint Revocable Living Trust
Click the link below to download a PDF document of the sample document...

Creating a Will
If you are of sound mind, or legally competent, and over 18, you can make a binding will...

Average Case Length of Common Legal Matters
There are many types of legal matters that you can become involved in...

Trusts - An Introduction
There are many kinds of trusts, and many are extremely complicated and expensive...

Buying or Selling a House - Should You Have Attorney Assistance?
Perhaps the most common transaction in the area of real property is the purchase or sale of a residential property...

View all >

FEATURED IN-NETWORK ATTORNEY

A very important part of LegalEASE are our Network Attorneys who provide excellent service to our members. Let us introduce to you Monica Donaldson Stewart, who is the managing attorney for Donaldson Stewart PC, a boutique family law and estate planning firm in Chandler, Arizona. Click here to learn more about Ms. Monica Donaldson Stewart.

SEARCH FOR AN ATTORNEY

Search for an attorney to assist you with your legal needs. Whether you are looking for help with selling a house, creating a trust, or asking a simple legal question, click here to search for a network attorney.

FEATURED: THE LEGAL EAGLE

MOVIES

GET LAWYERED PART 2!

AREAS OF LAW

Estate Planning
Stay prepared with estate planning where you can learn how to fine-tune your assets as your life situation changes.

Family
Family circumstances can change and we have provided articles to help walk you through difficult situations.

Traffic
Owning and operating an automobile comes with many responsibilities. Read topics such as traffic tickets to accidents.

<https://legalcorner.legaleaseplan.com>

Financial Counseling

Members (Non-Members excluded) can receive one-on-one coaching with certified credit counselors, watch monthly personal finance webinars and view self-paced financial education resources.

Featured In-Network Attorney

LegalEASE likes to highlight a specific attorney from our Attorney Network who provide excellent service to our members.

Attorney Search

Member and Non-Members can view our online attorney network and search by:

- Zip Code
- Area of Law
- Choose Attorney in Directory

Members receive:
Free Consultation plus their covered benefits
Non-Members receive:
Free Consultation & 15% off Attorney's Hourly Rates

Coming Soon: LAMP

LAMP: LegalEASE Attorney Matching Portal

LegalEASE is expanding our online solution options to members. Introducing the newest online self-service portal, **LAMP: LegalEASE Attorney Matching Portal** launching soon. A system to DirectConnect members to attorneys.

LegalEASE is proud to introduce a new online product solution to better serve our members and provide a better customer experience with quicker matching and connecting to a dedicated, qualified attorney available to assist your personal legal matters. Building an ideal attorney profile with preferences ranging from language options, disability accommodation, communication methods and a multitude of DEI (Diversity, Equity and Inclusion) needs our members desire from their attorney.

The screenshot shows the 'Attorney Matching Portal - Case #120' interface. At the top, there is a progress bar with five steps: Intake, Area of Law, Legal Details, Preferences (highlighted with a red circle), and Review. Below the progress bar, there is a '0 Chosen' indicator and a 'Clear' button. The main content area contains several preference selection cards: Languages, Race, Gender, Extended Office Hours, Disability Accommodation, Litigation Style, Communication Method, and Faith. Each card has a title, an icon, and a brief instruction. At the bottom right, there are 'Previous Step' and 'Review' buttons. A disclaimer at the bottom states: 'LegalEASE makes every effort to ensure provider information in this online system is correct. However, LegalEASE cannot be responsible for omissions or errors in the provider details. Utilizing this tool does not guarantee or deny coverage.'

<https://legalcorner.legaleaseplan.com>

Meet The LegalEASE Team



Jim Beideck
*Director of Client
Development*
713-785-7400 x3020



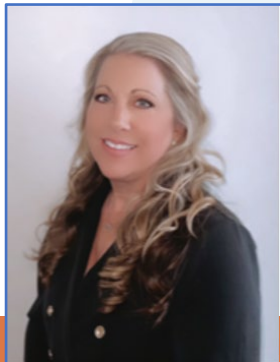
Carrie Lacey
Senior Account Manager
713-785-7400 x3021



Anna Demecs
Account Manager
713-785-7400 x3163



Kim Jordan
Account Manager
713-785-7400 x3017



Katie Cade
*Senior Account
Manager*
713-785-7400 x3027



Kim Rodriguez
*Account Management
Analyst*
713-785-7400 x3735



Vanessa Virgil
*Account Implementation
Manager*
713-785-7400 x3751



Chris Garcia
*Account Implementation
Advisor*
713-785-7400 x3759

Thank you!

Limitations and exclusions apply. This benefit summary is intended only to highlight benefits and should not be relied upon to fully determine coverage. More complete descriptions of benefits and the terms under which they are provided are received upon enrolling in the plan. Group legal plans are administered by Legal Access Plans, L.L.C. or LegalEASE Home Office: 5151 San Felipe, Suite 2300, Houston, TX. This legal plan may not be regulated as insurance in some states, but is available in all states. Plans are underwritten by insurance carrier partners in states where required. Please contact LegalEASE for complete details. ©2023 LegalEASE All rights reserved. LegalEASEPresentation_2023-01