

# Strengthening financial wellness with tax services.

We have partnered with TurboTax® to offer tax preparation and filing services.



- 1 Prepare and file one individual or joint federal and state tax return with any TurboTax “Do It Yourself” online product at **no additional cost.**<sup>2</sup> The three-tier TurboTax “Do It Yourself” solution fits the needs of any employee.



#### TurboTax Deluxe

- Maximize tax deductions and credits
- Ideal for common tax filers and homeowners
- Designed for homeowners and provides step-by-step guidance to help turn a significant investment into a big tax break



#### TurboTax Premier

- Investments and rental property
- Ideal for landlords and investors
- Designed for all levels of investing and investment types, from simple stocks to complex rental income



#### TurboTax Self-Employed

- Personal and business income and expenses
- Ideal for self-employed, independent contractors, freelancers and small business owners
- The perfect personal and small business tax solution

- 2 Get advice from a TurboTax expert or have a dedicated TurboTax professional prepare and file taxes on their behalf at a **discount of up to \$168.**<sup>3</sup>

- 3 Enjoy easy **access to various tax resources** such as a tax refund estimator, tax bracket calculator, planning checklist, and tax tips.

### Consider these stats:

**86%**

*of employees say finances are a source of stress*

**38%**

*of employees view employer financial wellness initiatives as a must-have<sup>1</sup>*

MetLife Legal Plans provides protection at every step. We offer real and tangible results in the form of legal representation and consultation and adding tax preparation and filing complements our existing financial legal services.

**To learn more about your coverages  
and see our attorney network, create  
an account at [members.legalplans.com](https://members.legalplans.com)**

**Questions? Call our Client Service Center  
1-800-821-6400**

1. 2021 MetLife U.S. Employee Benefit Trends Study.
2. This benefit provides access to TurboTax tax online preparation and filing software. TurboTax is not a corporate affiliate of MetLife Legal Plans. TurboTax benefit includes one federal and one state tax filing for tax year 2022. TurboTax Live and extra add-on services are available for an additional fee.
3. If the Covered Person prefers to prepare and file their taxes with a TurboTax professional, the legal plan will provide a discount in the amount of the appropriate online product value, up to \$168.00. This does not provide coverage for filing extensions, audit services, live help, or post-filing support. This benefit provides the Covered Person with access to one free Deluxe, Premier, or Self-Employed editions of TurboTax's self-guided online federal and state tax preparation and filing services.

TurboTax® may not be offered to government entities that require contractual requirements from a MetLife Legal Plans subcontractor or supplier.

Group legal plans are administered by MetLife Legal Plans, Inc., Cleveland, Ohio. In California, this entity operates under the name MetLife Legal Insurance Services. In certain states, group legal plans are provided through insurance coverage underwritten by Metropolitan General Insurance Company, Warwick, RI. For costs and complete details of the coverage, call or write the company. Some services not available in all states. No service, including consultations, will be provided for: 1) employment-related matters, including company or statutory benefits; 2) matters involving the employer, MetLife and affiliates and plan attorneys; 3) matters in which there is a conflict of interest between the employee and spouse or dependents in which case services are excluded for the spouse and dependents; 4) appeals and class actions; 5) farm and business matters, including rental issues when the participant is the landlord; 6) patent, trademark and copyright matters; 7) costs and fines; 8) frivolous or unethical matters; 9) matters for which an attorney client relationship exists prior to the participant becoming eligible for plan benefits. Coverage for defense of criminal matters is excluded from insurance coverage for individuals located in New York. For all other personal legal matters, an advice and consultation benefit is provided. Additional representation is also included for certain matters. Please see your plan description for details.