



# Small Business Legal Plan

## ESSENTIALS | PLUS | PRO



## Affordable legal protection tailored to your business needs.

**Hiring a law firm for your business can be expensive**, and DIY legal isn't always that helpful. LegalShield's Small Business Legal Plans remove the cost barrier and give you access to a provider law firm for an affordable monthly fee. With LegalShield you are not alone. Three levels of coverage are available.

### All Plans Include:

**Advice, Consultation and Research.** Legal consultation and research for business-related legal matters, such as employment, contract disputes, equipment leases and more.<sup>1</sup>

**Letters or Phone Calls.** Help with business legal matters with professional communications on your behalf.<sup>2</sup>

**Designated Consultation.** Telephone consultations on business legal matters such as tax issues, securities, intellectual property, immigration and more.

**Document Review.** Put business-related legal documents through legal review.

**Collection Letters.** A collection letter from a provider attorney on your behalf could help you recoup payments more efficiently.

**25% Member Discount.** Receive a 25% discount from the Provider Attorney's hourly rate for additional business legal work.<sup>3</sup>

### Plus and Pro Also Includes:

**IRS Audit Legal Services.** Legal assistance in the event of an IRS audit, investigation or examination of the member's federal tax return.<sup>4</sup>

**Expanded Interstate Services.** Receive coverage for select legal services in all 50 states.

**Flat Fee Services.** Save money by paying flat fees for certain legal services.

<sup>1</sup>Business legal matters covered under the Designated Consultations Benefit are excluded. Out-of-state consultations are not covered under this benefit for Small Business Essentials.

<sup>2</sup>Excludes collection letters under this plan benefit as collection letters are covered under a separate plan benefit.

<sup>3</sup>Discount does not apply to legal services rendered pursuant to the designated consultations benefit, contingency fee cases or fees set by a court.

<sup>4</sup>Available for a flat fee of \$50 per hour in New York.

FOR MORE  
INFORMATION,  
CONTACT YOUR  
INDEPENDENT  
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# Choose the plan that's right for your business.

	<b>Pro</b> \$169/month 5 Users	<b>Plus</b> \$99/month 3 Users	<b>Essentials</b> \$49/month 2 Users
Advice, Consultation, and Research	Unlimited number of consultations on covered business matters and up to 1 hour of legal research per matter (includes out of state)	Unlimited number of consultations on covered business matters and up to 1 hour of legal research per matter (includes out of state)	Unlimited number of consultations on covered business matters and up to 1 hour of legal research per matter (in state only)
Letters or Phone Calls <sup>1</sup>	40 communications each year, limit of 10 per month (additional available for \$75 each)	20 communications each year, limit of 5 per month (additional available for \$75 each)	10 communications each year, limit of 3 per month (additional available for \$75 each)
Designated Consultation	5 designated 30-minute telephone consultations per year for business legal matters related to International Law, Tax, Copyright, Trademark, Patents, Securities, Intellectual Property, Antitrust, Immigration, and non-domestic legal issues in Canada	5 designated 30-minute telephone consultations per year for business legal matters related to International Law, Tax, Copyright, Trademark, Patents, Securities, Intellectual Property, Antitrust, Immigration, and non-domestic legal issues in Canada	3 designated 30-minute telephone consultations per year for business legal matters related to Tax, Copyright, Trademark, Patents, Securities, Intellectual Property, Antitrust, Immigration and legal issues out of state
Document Review <sup>1</sup>	40 document reviews each year, limit of 10 per month – up to 25 pages (additional available for \$75 each)	20 document reviews each year, limit of 5 per month – up to 20 pages (additional available for \$75 each)	10 document reviews each year, limit of 3 per month – up to 15 pages (additional available for \$75 each)
Collection Letters <sup>1</sup>	15 collection letters per month (Additional available for \$75 each)	10 collection letters per month (additional available for \$75 each)	5 collection letters per month (additional available for \$75 each)
Trademark or Copyright Services <sup>2</sup>	1 per year, additional available for \$250 each	1 per year, additional available for \$500 each	25% discount off the provider attorney's hourly rate for business legal work
Employee Handbook Drafting	\$500 flat fee, once per year	\$750 flat fee, once per year	25% discount off the provider attorney's hourly rate for business legal work
Custom Contract Drafting	\$250 each, up to 25 pages	\$250 each, up to 25 pages	25% discount off the provider attorney's hourly rate for business legal work
IRS Audit Services	50 hours <sup>3</sup>	25 hours <sup>3</sup>	25% discount off the provider attorney's hourly rate for business legal work
Business Trial Defense	Option Available	Option Available	N/A
25% Member Discount <sup>4</sup>	On additional business legal matters	On additional business legal matters	On additional business legal matters

## Ask about our employee benefit options.

<sup>1</sup>Half of your available number of services can be used for out-of-state matters with Small Business Plus and your total allotment of services can be used for out-of-state matters with Small Business Pro.

<sup>2</sup>Filing fees, search fees, opinion letters, or other expenses will be paid by the Member.

<sup>3</sup>Receive up to 25 hours for Small Business Plus ("Plus") and 50 hours for Small Business Pro ("Pro") from a provider attorney in the event of an IRS audit, investigation or examination of the Member's federal tax return. This service includes one initial hour of consultation and advice within the first 30 days of receiving notification from the IRS. Beginning on the 31st day, a provider attorney provides 2.5 hours (Plus) or 5 hours (Pro) of representation or negotiation services prior to a lawsuit. If the Member is sued by the IRS, or after paying the disputed tax the Member sues the IRS, 21.5 hours (Plus) or 44 hours (Pro) of trial time or services are available. Coverage for IRS legal services begins with a tax return filed in the same year as the Effective Date of the membership.

<sup>4</sup>25% discount off the provider attorney's hourly rate for business legal work. This discount does not apply to legal services rendered pursuant to the designated consultations benefit, contingency fee cases or fees set by a court.

Eligibility: LegalShield Small Business Plans are only available to legal, for-profit businesses.

This is a general overview of the Small Business Legal Plans available from LegalShield for illustration purposes. LegalShield provides access to legal services offered by a network of provider law firms to LegalShield members through membership-based participation. Neither LegalShield nor its officers, employees or sales associates directly or indirectly provide legal services, representation, or advice. Small Business Legal Plans and certain benefits are not available in all states. See a Small Business Legal Plan contract for a specific state for complete terms, coverage, amounts and conditions. Custom contract drafting services don't include mergers and acquisitions, initial public offerings, or private placements, administrative or regulatory matters or franchise agreements and legal matters covered under Designated Consultations, pleadings or any documents related to administrative proceedings or lawsuits. Negotiations and redrafts are available under the 25% discount from the Provider Attorney's hourly rate.