

Trust & Estate Planning Benefit

Effective January 1, 2026, with our new legal benefit, you will now be able to gain access to attorneys to create various trusts for your estate planning needs.

In addition to you, this plan will also cover your spouse or domestic partner; unmarried, dependent children under the age of 19; or unmarried, dependent children up to the age of 26 if the child is wholly dependent upon you for support and maintenance and is enrolled as a full-time student.

The initial point of contact for every active participant is the toll-free number of the Legal Plan Office of Feldman, Kramer & Monaco, P.C., +1 (800) 832-5182 (for NY) or +1 (800) 292-8063 (for outside of NY). If necessary, the Legal Plan Office will then make referrals to local participating attorneys.

Below, please find a summary of some of the many benefits included in this Legal Benefit Plan:

Free Last Will & Testament Benefit

This benefit provides the covered individual with the opportunity to have a Last Will and Testament executed under the supervision of a Legal Benefits Plan Attorney. Advice regarding estate planning and potential strategies to reduce estate taxes are included.

Free Health Care Proxy Benefit

This benefit provides the covered individual with the opportunity to have a Health Care Proxy prepared and executed under the supervision of a Legal Services Plan Attorney.

Free Living Will Benefit

This benefit provides the covered individual with the opportunity to have a Living Will prepared and executed under the supervision of a Legal Services Plan Attorney.

Free Durable Power of Attorney Benefit

This benefit provides the covered individual with the opportunity to have a Durable Power of Attorney prepared and executed under the supervision of a Legal Services Plan Attorney.

Legal Plan Workshops Benefit

Our seminars are pre-consultation estate planning workshops tailored to motivate membership to take advantage of their legal plan and prompt them to complete their estate planning documents. This is an opportunity to reconnect with your more active members and, at the same time, advertise upcoming programs and events. Workshops, in general, educate members on why this and other union benefits are so valuable.

Free Minor's Trust Benefit

Allows the covered member to set up a trust that leaves property to a younger person, but in the care of a trustee, until the young person reaches a designated age.

Free Testamentary Supplemental Needs Trust Benefit

Allows the covered member to set up a trust that will preserve the beneficiary's eligibility for needs-based government benefits, such as Medicaid and Supplemental Security Income (SSI).

Will Days Benefit

Plan attorneys will conduct estate planning consultations, designed to motivate the membership to use their legal plan benefits and prompt them to complete their estate planning documents. On what we call “Will Days”, covered members will have the opportunity to have a one-on-one consultation with an attorney, who will educate members on how to complete their estate planning questionnaire.

Elder Law Benefit

Our Elder Law attorneys will consult with covered members on asset preservation strategies, focusing on asset transfers, which will protect assets in the event of the need for nursing home care. Elder Law attorneys can advise on State law and assist in putting a health and estate plan in effect, which can maximize eligibility for coverage of nursing home and home care costs while preserving one’s estate and assets.

Pooled Income Trust Benefit

(No Legal Fee); (Medicaid Home Care, While Preserving Income); (NY Only)

A pooled trust under Federal and New York statutes, allows disabled individuals and older adults seeking long-term care services to protect their income in order to qualify financially or maintain eligibility for government benefits such as Medicaid.

Deed Benefit

This benefit covers the preparation of any deed for which the Participant is either the grantor or grantee. Limit to two (2) deeds per year.

Patient & Caregiver Advocacy Benefit

This benefit provides covered members access to: a Nurse, Nursing Administrator, Nursing Home Admissions Director and Geriatric Social Worker. FKM will advocate on behalf of members and guide you or your loved-one in times of uncertainty. We collaborate with the covered member to understand their priorities and make informed healthcare and asset protection decisions that support what is important in their lives.

Special Education Benefit

This benefit offers the covered individual free advice, consulting, and advocacy in matters related to special education law, including adherence to Americans with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act, New York Education Law Section 3602 and other relevant laws and regulations.

Estate Administration Benefit

This benefit includes legal representation in an uncontested probate of a Last Will and Testament or an uncontested estate administration proceeding in the Surrogate’s Court in the absence of a Will.

Stockbroker Arbitration Benefit

This benefit allows the covered member with legal assistance on financial abuse cases arising out of Investment Fraud, Investment loss, Financial Adviser Misconduct, and Account Churning.

Scan the QR code for full benefit details:

