

## **Instructions for Triad EAP Will Generator**

**The following will help you in completing a free, Colorado specific will using a company called Nolo's web site. Please read all of the cautions and do your own research on completing a will in this manner. Nothing in this document should be construed as legal advice. This is not a recommendation for Nolo's will preparation service. It is only meant as a way to inform you of a benefit offered by the Triad EAP program. Only you can decide if this service will meet your needs.**

1. Log in to the [www.triadeap.com](http://www.triadeap.com) web site. User name is “gj” and password is “eap”.

The screenshot shows the homepage of the TRIAD Employee Assistance Program. At the top, there is a navigation bar with links for 'Home', 'EAP Services', 'Student Support', and 'Wh'. Below this is a large section titled 'Log In To Your EAP' with input fields for 'User ID' (containing 'gj') and 'Password' (containing three dots), and a 'LOG IN' button. To the right of the login form is a section titled 'EMPLOYEES' with text describing the benefits of the program and a 'Learn More' button. At the bottom, there is a footer with a list of services and a copyright notice: '© 2003-2015 Triad EAP, Grand Junction, Colorado. All rights reserved.'

https://www.triadeap.com

Most Visited Getting Started Free Hotmail Google Suggested Sites Web Slice Gallery

**TRIAD**  
Employee Assistance Program

Home EAP Services Student Support Wh

**Log In To Your EAP**

User ID:  
gj

Password:  
●●●

LOG IN

**EMPLOYEES**

Employees challenged by emotional, financial and life troubles lose their motivation, concentration and enthusiasm. The result: higher health care costs, less productivity, more accidents and low morale.

Learn how TRIAD support employees, and your bottom line.

Learn More

Services  
Employees & Families  
Management & Employers  
Student Support  
Our Counselors

What's an EAP  
EAP Cost Effectiveness  
Choosing an EAP

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2. Click on “Launch Financial Portal” under the Financial Services section.



### Counseling Services

[Click Here to Complete Survey](#)

Feeling stressed at home or work and need someone to talk to? You and your family have ready access to qualified, professional EAP clinicians with expertise in various family, work, emotional, and substance abuse issues.

[Employee Intake Form](#)

#### Find a Counselor/Provider

Counselor/Provider Name:  -AND/OR- City/State:

Zip Code:  within:

### Work/Life

Reduce the amount of lost work time spent searching for personal life resources. Get help with meaningful family friendly benefits to help better balance your work and family life: Child Care, Elder Care, Education, Adoption, Wellness, Pet care and much more.

[Launch Work/Life Portal](#)

### Wellness Services

Interested in a healthier lifestyle? A wellness coach can support and help motivate you to develop a personalized action plan. Areas include weight management, smoking cessation, fitness and exercise, stress management, and management of chronic conditions. Set up your coaching web portal including trackers, videos, articles, assessments and our multimedia healthy lifestyle tutorials.

[Login to Wellness Portal](#)

No account yet? [Create an account](#)

### Financial Services

Prolonged financial pressures can lead to problems with loved one, higher incidences of alcohol and drug abuse, depression, and despair. Comprehensive financial support helps you concentrate on your job, not on your financial worries.

[Launch Financial Portal](#)

### Legal Services

### Newsletters [View All](#)

- [2014 Holidays updated](#)
  - Now That's Service
  - When We Stand Alone
- [2014 Fall!](#)
  - There is no Blame, There is Only Love
  - Family Fighting Reduced by Alcohol Treatment
- [2014 Winter](#)
  - Stress Management (Top 10)
- [view more...](#)

### Online Seminars

**Upcoming Online Seminars: Register to attend.**

**OnDemand Online Seminars: Access one right now. [View All](#)**

Watch live or archived webinars to learn about ways to enhance personal effectiveness, improve communication techniques and fun & innovative work/life resources.

### Summary of Benefits and Coverage

[Your EAP Benefit Summary](#)

Click on "Launch Financial Portal"

3. On right side of the new page, click on “click here” in the State Specific Will Generator Section.

The screenshot shows a sidebar navigation menu on a website. The menu is organized into several sections:

- Articles:** A Look at 401(k) Plan Fees: An Introduction, A Look at 401(k) Plan Fees: Checklist, A Look at 401(k) Plan Fees: Common Investments and Related Fees—Part 1. (Found: 256) View All
- Calculators:** Financial Calculators Updated. (Found: 1)
- E-Learning:** Estate Planning: Five Essential Documents Updated. (Found: 1)
- Handbooks:** Financial Basics Handbook New. (Found: 1)
- Legal Forms:** Beneficiary Work Sheet Updated, Daily Expenses Updated, Demand Collection Agency Cease Contact Updated. (Found: 23)

On the right side of the sidebar, there are two more sections:

- Favorite Content:** Protecting Your Child's Financial Future, Mutual Funds, Investing 101, HUD's Section 203(k) Rehabilitation Program: Part 1—Introduction, HUD's Section 203(k) Rehabilitation Program: Part 3—Definitions for Use.
- Centers:** Live Well Wellness. To access Wellness Coaching programs: Login or Register Here.

The **State Specific Will Generator** section is circled in red, and a callout bubble with the text "Go Here" points to the "Click here..." link within this section.

4. This brings you to the Nolo web site. There is a bunch of useful information on the Nolo site you should read as it will help you decide if their product will suit your needs. I highly recommend you read the “Is Nolo’s Simple Will Right For Me” section. (In the “Triad EAP Wills for Employees” file on G:Share I have included some articles and other information from various sources that you may find helpful.)
5. To go into the Nolo will program, click on “Click here to easily create your simple, state-specific will”.

My Benefits LIVECONNECT  
ONLINE

Work/Life Home /

Link(s) may open a new browser window. Close window to return to this page. | [Print](#) | [Send Feedback](#)

## State Specific Will Generator



Click Here

[Click here to easily create your simple, state-specific will](#) at no cost to you through a step-by-step, online "Interview" process. Enter the "Discount Code" of **1513** on the "Billing Information Form." This form will appear *after* you've created your Account by submitting your e-mail address and a password. This service is provided through our partner Nolo, a leader in do-it-yourself legal forms since 1980.

**Is Nolo's simple will right for me?**

Nolo's online will is a straightforward, legally valid document. It should work well for most people with typical assets such as a house, a car, savings, and investments. But there are some situations in which you may need more than a simple will and should get expert advice or, at the least, investigate your options. For example:

- If you think that you or your spouse may leave assets worth more than \$2 million, your estate may owe federal estate tax, and you should investigate tax-saving strategies.
- If you anticipate family fights, see a lawyer for advice on how to stave off bad feelings and legal battles.
- If you want to set up a long-term trust for a child with special needs, find out how you can provide for your child without jeopardizing government benefits.
- If you are a resident of Louisiana. Louisiana based its estate planning laws on the Napoleonic code, while all the other states based their laws on English common law, and Louisiana's estate planning laws remain unique. If you have questions about estate planning in Louisiana, please use your attorney referral benefit to be referred to an estate planning attorney practicing in Louisiana.

Rate your satisfaction with this content by using the stars below. Selecting more stars indicates greater satisfaction; selecting fewer stars indicates less satisfaction. Place your cursor over the stars and move it toward

### Categories

- [Bankruptcy](#)
- [Consumer Rights](#)
- [Courts and Mediation](#)
- [Credit Repair and Debt](#)
- [Criminal Law](#)
- [Discrimination](#)
- [Elder Law](#)
- [Estate Law](#)
- [Family and Divorce](#)
- [Hiring a Lawyer](#)
- [Landlords and Property Management](#)
- [Meeting With a Lawyer](#)
- [Parenting and Adoption](#)
- [Real Estate](#)
- [Renters' Rights](#)
- [Social Security and Retirement](#)
- [Taxes and Audits](#)

### Centers



**Live Well Wellness**

To access **Wellness Coaching** programs:

[Login or Register Here](#)



**State Specific Will Generator**

Get information about how to create a state specific will. [Click here...](#)

6. The next page looks like this. Has some great stuff to review, and the link to start the process. Don't let the price of \$34.99 dissuade you. Your cost will be \$0.00.

## Product Details

## System Requirements

## Online Will FAQs

Write your will online right now! Make a will and ensure that your final wishes are carried out. 100% money-back guarantee if you are not totally satisfied! The **Online Will** is easy, thorough and legally valid in your state\*. Enjoy unlimited revisions and secure 24-hour online access to your document -- plus, you'll receive detailed instructions for what to do when your document is complete.

With the **Online Will** you can:

- Name beneficiaries to inherit your property
- Name a guardian to care for your young children
- Cancel debts others owe you
- And much more!

With help on every screen, you'll be able to create your will in record time. Plus, Nolo offers exceptional customer service by email or telephone, with additional help from our experienced technical support team.

Save on legal fees and time with Nolo's comprehensive Online Will. Don't delay, get your affairs in order now!

- [Is Nolo's online will right for you?](#)
- [See a sample will](#)
- [Nolo's Online Will FAQ](#)

Good Info to Review

\*Estate planning documents not valid in Louisiana, U.S.Territories or Canada.

If you live in Louisiana and would like to write your will, use the following form:

- [Louisiana Will Form](#)

You can trust Nolo

For over 40 years Nolo has been publishing affordable, plain English books, forms and software on a wide range of legal and business issues, including estate planning, small business, personal finance, housing, divorce and intellectual property. Everything we publish is regularly revised and improved by our staff of lawyer-editors, to make sure that it's the best it can be. We pay close attention to changes in the law and we'll make sure your online legal documents stay legally up to date.

- "In Nolo you can trust."  
-- **The New York Times**

## Online Form

Price: ~~\$34.99~~

[Start Now](#)

Customers who Bought This Item Also Bought

If you want to proceed. Don't worry about the price. It will be \$0.00.

7. Assuming you have never created a Nolo account, click on "continue" to set one up.

Sign In | Support | Show Cart (1)

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**Get Informed**  
Free Legal Information

**Do It Yourself**  
Shop at Nolo

**Find a Lawyer**  
Nolo's Lawyer Directory

### Checkout

#### 1 Checkout Method

**No Account?**  
Continue with checkout and you can create a Nolo account at the next step.

**To Continue**

**Account Holders**

Email Address \*

Password \*

[Forgot your password?](#)

\* Required Fields

#### 2 Billing Information

#### 3 Payment Information

### Order Summary

Here is a summary of your order.

Online Will — 1 Year	\$39.99
Online Form Quantity: 1	\$34.99
<i>Subtotal</i>	\$34.99
<i>Tax</i>	\$0.00
<b>Grand Total</b>	<b>\$34.99</b>

[Forgot an Item? Edit Your Cart](#)

#### Discount Codes

Enter coupon code if you have one.

Coupon Code

Need help? Call us at (800) 728-3555,  
Monday through Friday, 9 a.m. to 5 p.m. PST

- This gets you to the page to create the account. Fill in all the blanks, set a password. Over to the bottom right, enter "1513" in the Coupon Code box and click "apply coupon". This is how the price goes to \$0.00. Then hit the green "continue button" on lower left.

Sign In | Support | Show Cart (1) **GO**

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Nolo's Lawyer Directory

### Checkout

Fill in these boxes.

1 Checkout Method

2 Billing Information

First Name \*

Last Name \*

Email Address \*

Confirm Email \*

Zip/Postal Code \*

Telephone \*

I would like to receive periodic promotions and special offers from Nolo

**Why do I need an account?**

Having an account enables you to save, edit, and print your document for the full term of your subscription. Nolo will never renew your subscription without your permission.

Password \*

I have read and agree with the terms and conditions

\* Required Fields

**CONTINUE** →

3 Payment Information

### Order Summary

Here is a summary of your order.

Online Will — 1 Year	\$39.99
Online Form	\$34.99
Quantity: 1	
Subtotal	\$34.99
Tax	\$0.00
Grand Total	\$34.99

Forgot an Item? [Edit Your Cart](#)

### Discount Codes

Enter coupon code if you have one.

Coupon Code

**Apply Coupon**

Need help? Call us at (800) 728-3555, Monday through Friday, 9 a.m. to 5 p.m. PST

9. Now you see the price is \$0.00 as the coupon code was applied. Enter your email address and password and hit "Login" to continue.

Sign In | Support | Show Cart (1)

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Nolo's Lawyer Directory

## Checkout

▪ Coupon code "1513" was applied.

### 1 Checkout Method

**No Account?**  
Continue with checkout and you can create a Nolo account at the next step.

**Account Holders**  
▪ Coupon code "1513" was applied.

Email Address \*

Password \*

[Forgot your password?](#)

\* Required Fields

Enter your email address and password and click "Login".

### 2 Billing Information

### 3 Payment Information

## Order Summary

Here is a summary of your order.

Online Will — 1 Year	\$39.99
Online Form	\$34.99
Quantity: 1	
<i>Subtotal</i>	\$34.99
<i>Discount (1513)</i>	-\$34.99
<i>Tax</i>	\$0.00
<b>Grand Total</b>	<b>\$0.00</b>

Forgot an Item? [Edit Your Cart](#)

### Discount Codes

Enter coupon code if you have one.

Coupon Code

Need help? Call us at (800) 728-3555, Monday through Friday, 9 a.m. to 5 p.m. PST

**BBB** ACCREDITED BUSINESS  
Rating **A+**

**NOLO**

**COMPANY INFORMATION**  
About Nolo  
Careers  
Press Room

**FREE LEGAL INFORMATION**  
Articles & FAQs  
Calculators  
Law Blogs

**PRODUCTS & SERVICES**  
Books & Software  
New Arrivals  
Bestsellers  
Legal Updates

**LAWYER DIRECTORY**  
Grow Your Practice  
Find a Lawyer  
Lawyers by Location  
Lawyers by Legal Issue

**SALES**  
Licensing  
Affiliates  
Academic  
Library

**CONNECT WITH NOLO**  
Find us on Facebook  
Follow us on Twitter  
Watch us on YouTube

10. This takes you to this page. Click on "go to my document" to proceed.

Sign Out | My Account | Support | Show Cart



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## Thank you

Your order has been processed and a copy of this receipt will be emailed to you at [pq569@bresnan.net](mailto:pq569@bresnan.net). Have any questions? [Contact us](#).

**Please Note:** Sometimes legitimate emails like Order Confirmation emails get stuck in your Spam/Junk folder. For this reason, we recommend you to check your Spam/Junk folder. In order to receive future important emails like Shipping Notification, Account Expiration etc from Nolo, we suggest you mark our emails as not spam and add [orders@email.nolo.com](mailto:orders@email.nolo.com) to your address book or safe sender list.

Order #: 1003 [redacted]  
Placed on: February 27, 2015

Items Purchased	Format	Price	Quantity	Total
 <div style="border: 1px solid black; border-radius: 50%; padding: 5px; display: inline-block;"> <p>Online Will — 1 Year <a href="#">Go to My Document</a></p> </div> <p><a href="#">Go to My Online Products</a></p>	Online Form	\$34.99	1	\$34.99

**Payment Information**

[redacted]  
[redacted]

T: 970-986-[redacted]

**ORDER TOTAL**

Subtotal	\$34.99
Tax (CA only)	\$0.00
Shipping & Handling	\$0.00
Discount	-\$34.99
<b>Grand Total:</b>	<b>\$0.00</b>

This takes you to the start of your will.

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<b>COMPANY INFORMATION</b>	<b>FREE LEGAL INFORMATION</b>	<b>PRODUCTS &amp; SERVICES</b>	<b>LAWYER DIRECTORY</b>	<b>SALES</b>	<b>CONNECT WITH NOLO</b>
<a href="#">About Nolo</a> <a href="#">Careers</a> <a href="#">Press Room</a> <a href="#">Blog</a>	<a href="#">Articles &amp; FAQs</a> <a href="#">Calculators</a> <a href="#">Law Blogs</a> <a href="#">Law Dictionary</a>	<a href="#">Books &amp; Software</a> <a href="#">New Arrivals</a> <a href="#">Bestsellers</a> <a href="#">Legal Updates</a>	<a href="#">Grow Your Practice</a> <a href="#">Find a Lawyer</a> <a href="#">Lawyers by Location</a> <a href="#">Lawyers by Legal Issue</a> <a href="#">Tips on Hiring Lawyers</a>	<a href="#">Licensing</a> <a href="#">Affiliates</a> <a href="#">Academic</a> <a href="#">Library</a> <a href="#">Trade</a>	<a href="#">Find us on Facebook</a> <a href="#">Follow us on Twitter</a> <a href="#">Watch us on YouTube</a> <a href="#">Listen to us on iTunes</a>

11. The next page gives you background information for proceeding.

Sign Out | My Account | Support | Show Cart

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Unfinished Will

### Before you begin...

Here's a list of what you'll need to make your will.

Don't worry if you don't have all of this information now; you'll have plenty of time to gather everything and make decisions as you prepare your document. We'll provide help along the way.

- a rough inventory of what you own
- the names and birthdates of your children
- if your children are young, the names of guardians to care for them
- the names of those to whom you want to leave your property
- the names of managers for young beneficiaries' property
- information about your pets, including names, descriptions, and preferred caretakers
- information about debts you want to forgive
- the name of your executor -- that is, the person who will wrap up your affairs, and
- if you choose, the gender, birth date, and contact information for those you've named in your will.

**More Information**  
▼ [Want to Print This Checklist?](#)

**Want to Print This Checklist?**

To view and print a more detailed version of this list, click here: [Will Checklist](#).

You will need Adobe Reader to view and print this document. If it's not already on your computer, you can download it for free at [adobe.com](#).

12. Clicking "Next" gets you to step 1 of 8. Self-explanatory from there. It begins an interview process where you answer questions, supply information, and move on to the next steps. In the end you will have a completed document, a PDF for you to save, complete instructions on how to sign it with witnesses, where to store it, what to do about copies, etc.

Sign Out | My Account | Support | Show Ca

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Unfinished Will Step 1 of 8

## Will Checklist

Go through the items listed on this screen.

Each time you complete a step, you'll come back to this checklist. You can revise completed steps at any time.

1. **You and Your Residence**
2. Your Family
  - Marital or Domestic Partnership Status
  - Children and Grandchildren
  - Pets
3. Your Property
  - Main Bequest
  - Specific Bequests
  - Residuary Bequest
4. Property Management
5. Forgiving Debts
6. Paying Debts and Taxes
7. Executor
8. Wrap Up

[Back](#) [Next](#)

### More Information

- ▼ **What Each Part Does**
- What the Checkmark Means
- Why Some Parts Are Grayed Out
- Why You Can't Skip Ahead
- Using the Back Button
- Exiting the Program
- Information You'll Need to Make Your Will

#### What Each Part Does

You will go through some or all of these steps, depending on your personal circumstances.

**Part 1.** You and Your Residence. Here, you provide a bit of personal information about yourself, including your state of residence. Your document will be tailored to the law of your state.

**Part 2.** Your Family. In this part, you provide information about your relationship status, children, grandchildren and pets. If you have children you can name a personal guardian for them.

One quirk I found when you get to the review stage: If you spell a common name incorrectly for one of your people, you may get a message that says something like “you have not designated xxxxx for this person.” If you read further in the instructions for this error message, it will tell you 1. You may have forgotten something or 2. You may have spelled the name wrong. So if you are certain you didn’t forget whatever they are telling you you forgot, double check the spelling of the name. Drove me crazy when I had entered “Eliizabeth”, but when I corrected the spelling everything continued okay.

Also – there is some type of time limit built into the program once you start your will. I think it is 30 days. Not sure what happens if you take more than 30 days to finish, but it may be that you can’t get access to what you started. No worry if your access lapses. The worst thing is you have to start over with a new account. Immediate family members can also go through this process using these steps to create a will.