

# Estate planning service

Includes access to an estate administrator, a digital vault with estate inventory, planner portal and a clear and visual distribution plan.



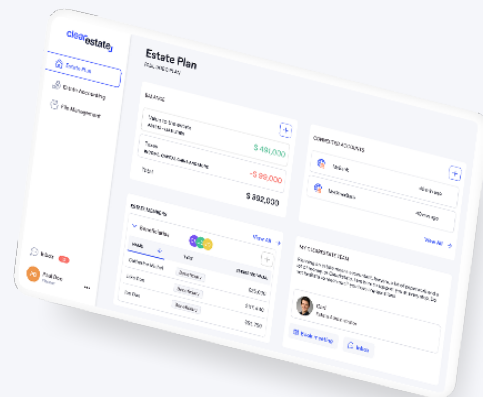
It always feels too early to plan ahead, until it's too late. By planning your estate, you can cut the average time to distribution by 6 months and save your loved ones a lot of frustration, costs, and energy.

Our estate professionals will provide transparent, one-on-one support to help you set your affairs in order. When at need, your estate executor will be able to call on us to guide them on the best path to estate settlement. Planning your estate is the best gift you can give your loved ones!

## ClearVault

Modern take on estate planning. Our estate professionals craft your estate plan and store it in a secure digital vault.

Your purchase of ClearVault today enables your Executor to quickly and easily settle your future estate.



## Book your free consultation

Talk to your advisor for more information.

### 4 plans

to better serve you

#### Essential

For planners seeking an estate plan with a valid will

- Dedicated Estate Professional (EP)
- 1 hr session review of information to store
- Online estate planning tool
- Online access & support for your executor for when the time comes

#### MOST SELECTED

#### Plus

Everything in the Essential plan, plus:

- Extra 1 hr session review of information to store (total 2 hrs)
- Preparation of Will & Power of Attorneys
- Affidavit of execution of will
- Mailed Hard Copy Estate Plan
- Stored Original Will, Power Of Attorney & affidavits (\$50/yr add-on)

#### Complete

Everything in the Plus plan, plus:

- Extra 1 hr session review of information to store (total 3 hrs)
- 2 30 min sessions/yr with Estate Professional
- Complex estates (Customized Add-On \$)
- Stored Original Will, Power Of Attorneys and affidavits (Included)

#### Executor

Everything in the Complete plan, plus:

- Extra 30 min sessions/yr with Estate Professional (total 3 sessions)
- ClearEstate and its trust partner named as your corporate executor for your future estate settlement.\*

\*Premium Estate Settlement Service will be bonded to the planning service.

DISCOUNT AVAILABLE FOR COUPLES PLANNING THEIR ESTATE

Planning an estate means lawyers, accountants, repetitive paperwork, a lot of time and a lot of money.

Or, ClearEstate.

Knowing how to plan an estate isn't just something you know.

We've thought ahead, so you can take it one step at a time.

Talk to your advisor for more information and to request a free consultation.



Estate  
planning and  
settlement  
services



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