

Estate settlement service

Includes access to an estate administrator, executor checklist, executor portal, and a communication center for beneficiaries.



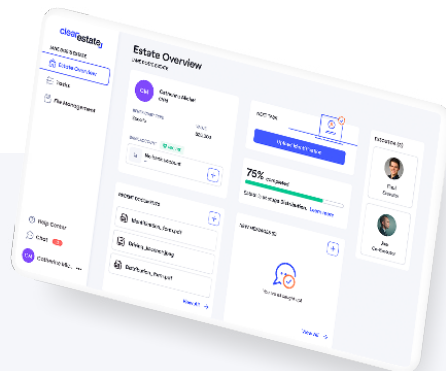
Dealing with the grief of losing a loved one is emotionally exhausting and it's not the time to be learning complicated estate settlement processes as you go.

ClearEstate simplifies the process of estate settlement and probate for the average Canadian family.

Beneficiary Portal

Our beneficiary portal creates full transparency for both beneficiaries and executors by allowing beneficiaries to view the progress of the settlement, receive a summary of what assets they're entitled to, and keep detailed records of all communications.

Building trust and maintaining transparency is key for a smooth process—and we'll make sure it happens.



Book your free consultation

Talk to your advisor for more information.

4 plans to better serve you

Essential

For executors seeking to settle an estate

- Dedicated Estate Professional (EP)
- First notifications to government entities and ID Theft Protection agencies
- Probate application for 1 jurisdiction
- 2 document virtual notarizations
- Asset & Liabilities inventory
- 2 30 min Asset & Liabilities discovery & liquidation live consultations
- Online Settlement Tool Kit

Plus

Everything in the Essential plan, plus:

- Extra 1h Asset & Liabilities discovery & liquidation live consultation
- Beneficiary portal
- Tax filings (terminal, clearance)

MOST SELECTED

Complete

Everything in the Plus plan, plus:

- Extra 3 document virtual notarizations (total 5)
- Extra 1h Asset & Liabilities discovery & liquidation live consultation
- Asset & Liabilities research by an EP + Automated asset discovery
- Representation (up to 20h with Financial Institutions + up to 10h with 3rd parties)
- Data entry
- Estate accounting reports

Premium Estate

Everything in the Complete plan, plus:

- Probate application for up to 2 jurisdictions
- Extra 5 document virtual notarizations (total 10)
- Asset & Liabilities discovery & liquidation live consultations
- Representation (up to 50h with Financial institutions + up to 25h with 3rd parties)
- ClearEstate and its trust partner as Corporate Executor* (option)

*Planning Executor Package must be purchased prior

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

Or, ClearEstate.

Knowing how to settle 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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