

Modernized estate planning and settlement solutions



Whether settling a loved one's estate or creating your own estate plan, ClearEstate provides **transparent, one-on-one** support for all estate-related matters.

We put everything required for estate settlement and estate planning — every step, meeting, and estate professional — **all in one place**. In other words, we're a one-stop-shop for all estate-related services.

ClearEstate's unique digital platform and team of expert estate professionals are **changing** the way estates are planned and settled:

Traditional route

- Hiring attorneys, accountants and other professionals can be expensive and they charge by the hour
- The process often takes too much time
- Hired professionals do not offer support throughout the whole process of estate planning or settlement.

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- > We've harnessed technology to save estate planners and estate executors time and money
- > Our services cost 1/3 of the price of other professionals, and flat fee billing means **no surprises**
- > Our process is completely **transparent** for estate executors and beneficiaries alike
- > The **customer's experience** is our number ONE priority

The ClearEstate digital platform enables a fast, easy and less expensive settlement process.



Executor Companion Tool

With dedicated
online chat



Estate Overview Dashboard

Automated
form-filing and
one-click form
submissions



Estate Accounting Dashboard

Automated asset
discovery



Beneficiary Portal

Estate activity log

The ClearEstate team is composed of dedicated estate professionals, trust officers, paralegals, wills & estate attorneys, estate and tax accountants who combined have decades of professional experience helping and serving clients in all matters related to estate planning and estate settlement.

Our team has harnessed technology to provide the best guidance, expertise and efficiency for every estate planning or settlement need, no matter what the situation may be.



We're **real, helpful people** who've thought through every step, so we can **empower** estate planners and estate executors to navigate all estate related matters efficiently and confidently.