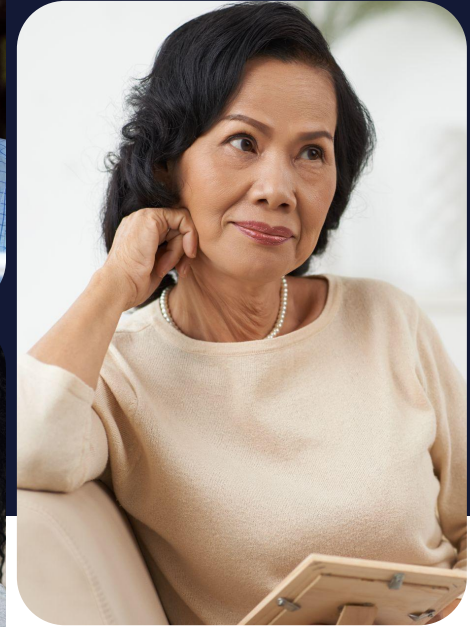


clear_{estate}

Changing the way estates are settled.



Estate planning and settlement is complex and time consuming



Highly
Detailed



Legal
Documents
& Processes



Multi-
disciplinary
Expertise



View of All
Assets



Next
Generation /
Dynamics



Fiduciary
Duties

Complete estate and trust solutions are challenging to provide

You NEED an expert partner



The modern-era Trust Office

Independent

We don't offer competing services

Affordable

1/3 cost of traditional providers

Simple

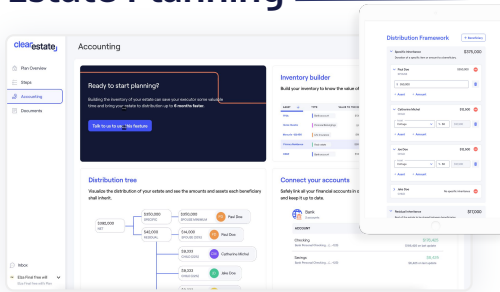
Proprietary tech makes it easy

Expert

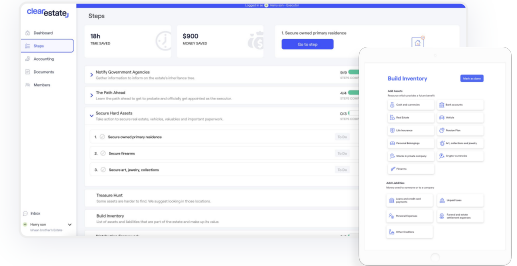
Multidisciplinary team of experts

Tech-enabled, **personalized**, expert **estate and trust services**.

Estate Planning



Estate Settlement



We help Financial Advisors



Deepen household relationships with personalized estate planning



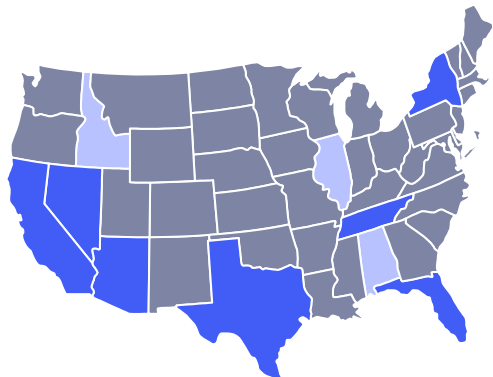
Guard against competitors with complete professional trust services



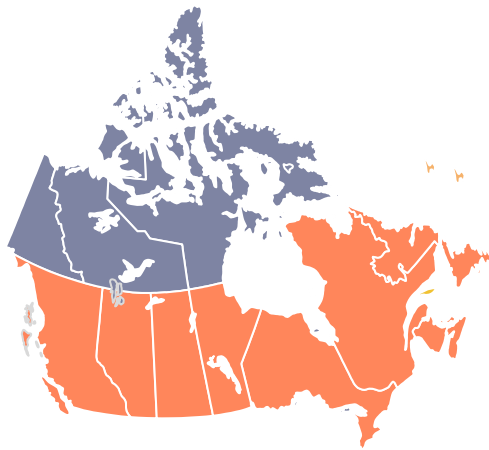
Increase AUM with a clear view of all assets and intergenerational wealth transfer

Our experience

+1,400 estates being processed
 +650MM assets on platform



Focused & Expanding



National presence

Avg. estate asset value: \$698K
 Avg. planning asset Value: \$1.2MM

Investors

OMERS | Ventures

DIAGRAM

NATIONAL BANK | NAventures

Partners

EQ Bank | Concentra[®] TRUST

IAA Private Wealth

IG

ECHOLON WEALTH PARTNERS

NATIONAL BANK

FULL-CIRCLE AFTERCARE

SPT

And more...

Helping democratize Estate & Trust services...

Serving the aging demographic segment...

In preparing their legacy or helping the loved ones of the deceased

45 to 80+ years old
Average Planner age of 63

Across all levels of affluence

ClearEstate is the only Trust operating across wealth levels, from affluent to high-net worths

With Services that are

Affordable

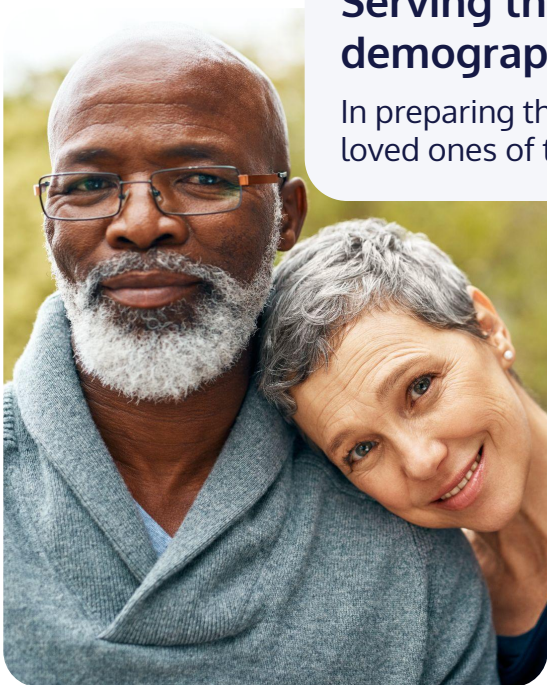
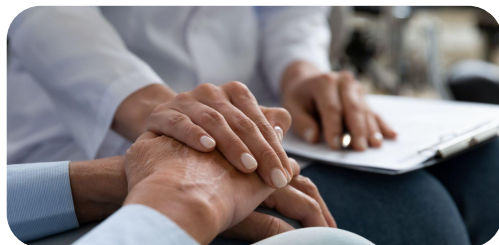
1/3 cost of traditional providers

Simple

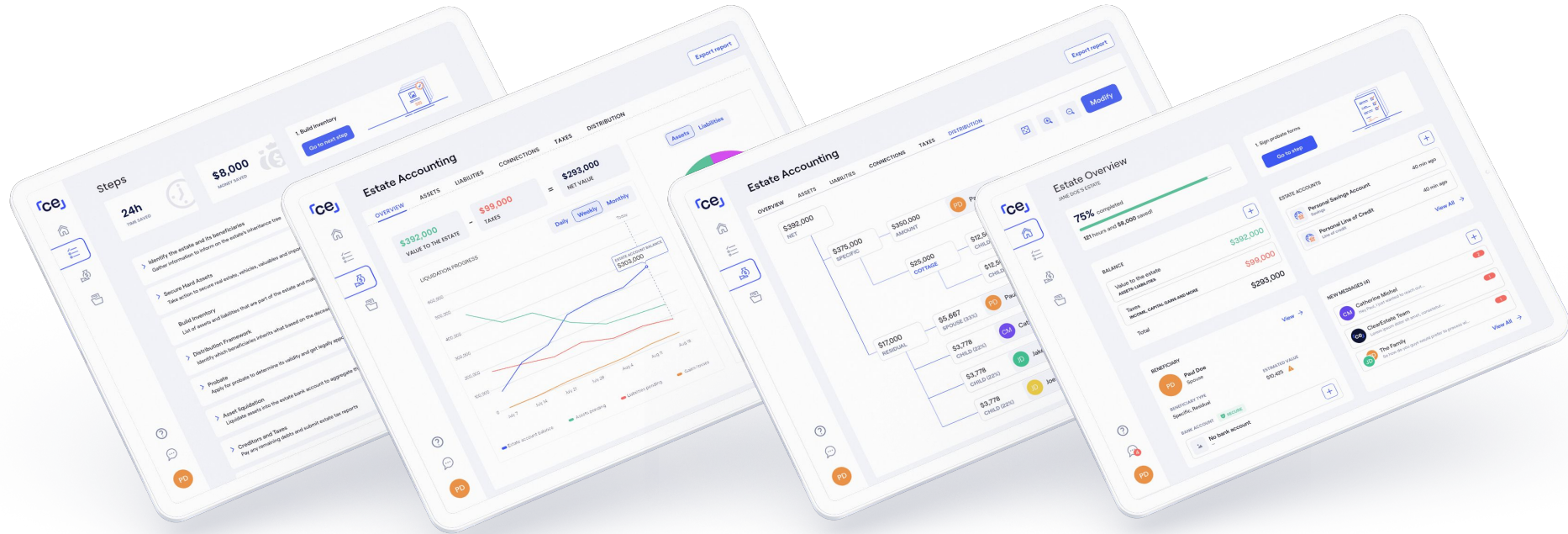
Proprietary tech makes it easy

Expert

Access to expertise for guidance



...through Technology that supports 10x the scale of a traditional Trust Office



Benefits of Partnering with ClearEstate

Deeper relationships with clients and their heirs / beneficiaries through an end-of-life conversion

Improved retention of client assets post-death, through continued investment management mandate

(Power of attorney, estate administration and/or trust management)

Consolidated 360° view into wealth beyond traditional Financial assets

(real property, art, personal belongings, etc.)

Estate Planning Process with ClearEstate

With ClearEstate, you can ensure your **wishes are clear** and will be carried out **quickly and efficiently**, leaving the **legacy you intend** for your family.

Intro to your **dedicated Estate Professional** and discovery of your goals

Guidance and coaching on your key considerations and decisions

Creation of your **estate planning documents** (will, trusts, power of attorney for property and personal care, health care directives, etc.)

Unlimited access to platform to keep your information up to date and **annual review** with guidance on changes and improvements

Intake of your **personal and asset information**

Development of your **personalized estate plan**, including a visual of your estate distribution

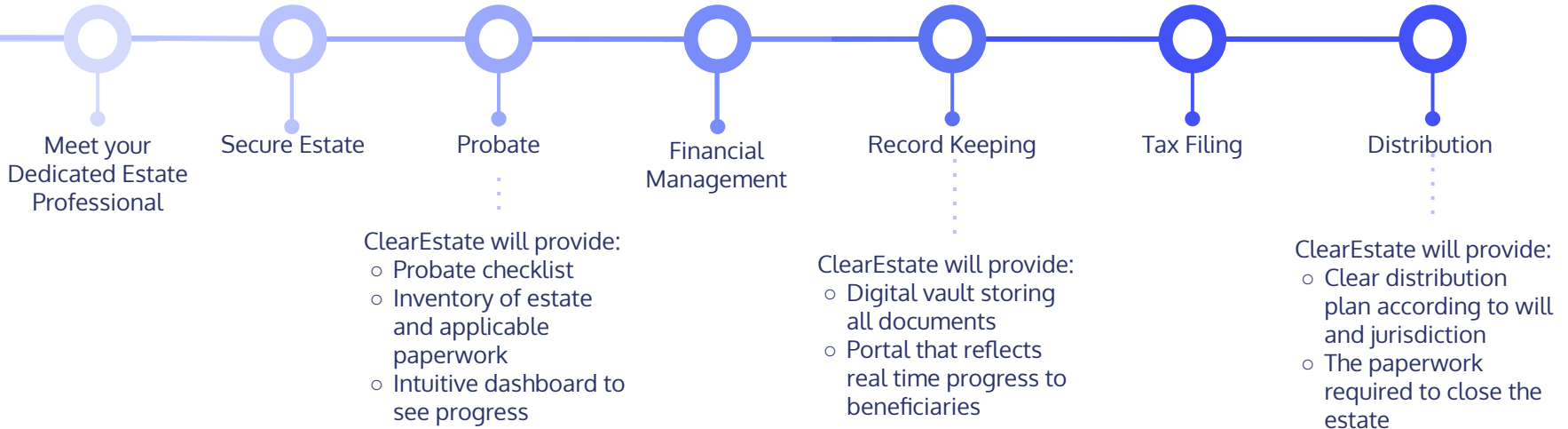
Securely store all documents and information in **ClearVault**, easily accessible for you and your loved ones when needed

You will receive **expert and personalized guidance** from our **team**, every step of the way.

Estate Settlement Process with ClearEstate

It takes **~16-18 months** to settle an estate, with average legal and accounting fees of \$12,400 *based on average estate size of \$200,000*

ClearEstate clients often reduce that by **3-6 months** at **1/3 of the cost**



You will receive **expert and personalized guidance** from our **team**, every step of the way.

What clients are saying

Carolyn Sue Janus

Deepa is extremely responsive to all my question

Deepa is extremely responsive to all my questions no matter how insignificant they are. Probate is a costly and long process. So far ClearEstate has been very timely in processing paperwork



Tambrey Anne Thomas

Absolutely the best!

They made a very trying and confusing time much easier for me. The team are awesome and very dedicated.



David Humphrey

ClearEstate made everything clear as I settled the estate.

From initial contact through completion of work to settle my stepfather's estate ALL staff at ClearEstate were professional, polite and responsive. Kudos to everyone for coaching me as a rookie executor through the process. I will utilize their services again if needed.



Kim Vinh T Vu

My First Experience with ClearEstate

At 81 years old I am having the most important and difficult job to accomplish in my life. I know I would not be able to do it myself. It is indeed a very hard job. We are so lucky and blessed to receive the outstanding assistance from the wonderful ClearEstate team members. We put our complete trust in them and try our best to follow their instructions. Kim Vu and family



Warren Klein

Excellent online guidance system

Appreciate the ease of access, quick availability to answers, and guidance through the process.



Your Next Step Is Clear.

Become a partner in a few clicks.
Visit clearestate.com/partner

hello@clearestate.com | clearestate.com

