

Step-by-Step Consultation Booking Process

This document describes how advisors can book a free 30-minute consultation with ClearEstate on behalf of their clients

- 1) Go to the advisor help centre at clearestate.com/partners/advisor-help-centre or to your custom referral webpage supplied to you by ClearEstate.
- 2) Go to the date selector, choose a date/time convenient for the client and click on **"Confirm"**

30 min

We are happy to provide this 30 min consultation in order to answer some of your questions and present our solutions for families in need of estate planning or estate settlement. **The consultation will be done via videoconference** - please follow the instructions to that effect.

See you soon.

The ClearEstate team

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Eastern Time - US & Canada (10:38am)

- 10:30am
- 12:30pm
- 1:00pm
- 1:30pm
- 2:00pm
- 2:30pm

Confirm

- 3) Fill out the **CLIENT'S** contact information in the first fields for First Name, Last Name, Email, and Phone Number.

Enter Details

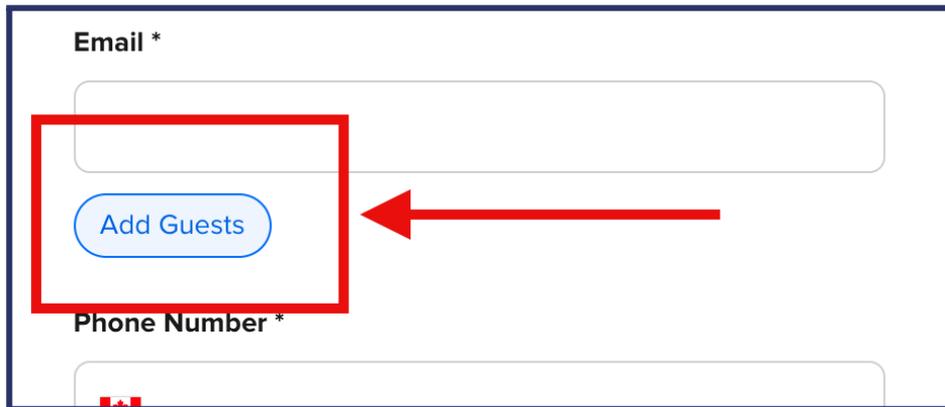
First Name * Last Name *

Email *

[Add Guests](#)

Phone Number *

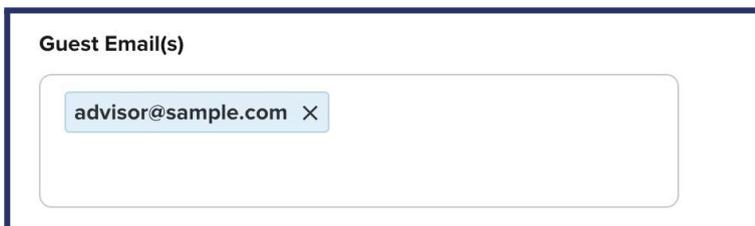
- 4) If you have your client's permission to join the meeting, add yourself as an attendee by clicking on the "Add Guests" button and *then* entering your email in the "Guest Email(s)" box when it appears.



This screenshot shows a form section with the following elements:

- Email ***: A text input field.
- Add Guests**: A blue button with white text, highlighted by a red rectangular box.
- Phone Number ***: A text input field.

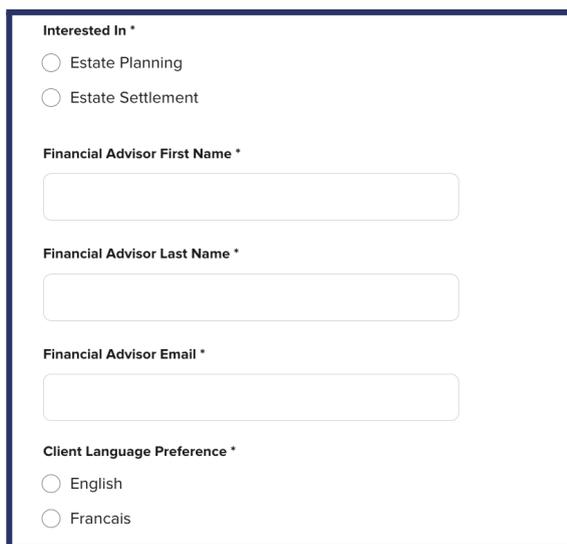
A red arrow points from the right towards the "Add Guests" button.



This screenshot shows a form section with the following element:

- Guest Email(s)**: A text input field containing the email address "advisor@sample.com" with a small 'X' icon to its right.

- 5) Fill out the rest of the required information about yourself and the client such as your contact information, the client's interest, their approximate estate value, etc.



This screenshot shows a form section with the following elements:

- Interested In ***: Two radio button options: "Estate Planning" and "Estate Settlement".
- Financial Advisor First Name ***: A text input field.
- Financial Advisor Last Name ***: A text input field.
- Financial Advisor Email ***: A text input field.
- Client Language Preference ***: Two radio button options: "English" and "Francais".

- 6) Click on "Schedule Event" to complete the booking and you're done!

Schedule Event