Modernized Estate Planning Solutions

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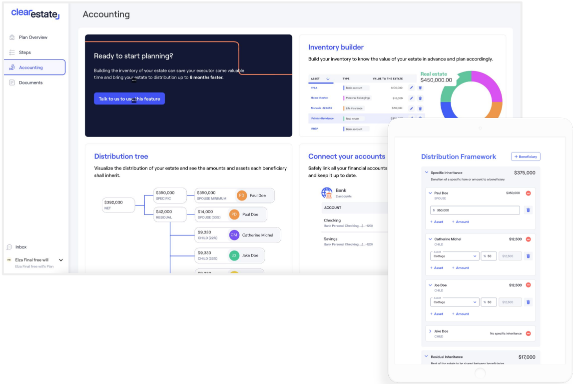
Canada (excl. Quebec)

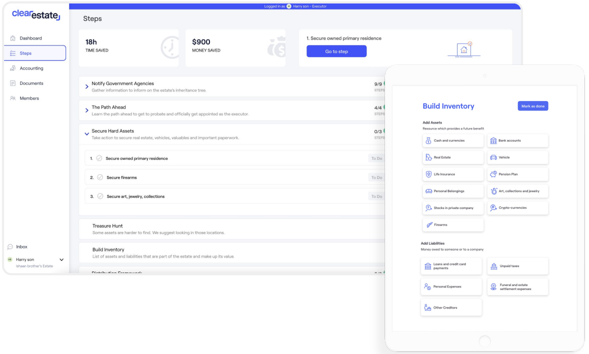
Meet clearestate

Modernized estate planning and settlement solutions



Estate Planning

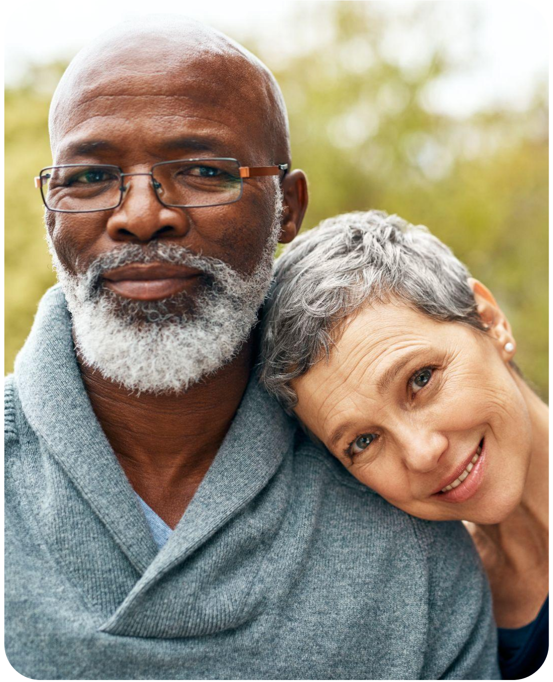
Guidance, Will & PoA documents, asset & liability aggregation, vault storage & professional executorship



Estate Settlement

Probate, guidance, taxes, accounting, distribution support & stakeholder management

Supporting families in life’s most important moments



Making a will

Ensuring your family and assets are protected
(New parents | Homeowners | Newlyweds | Retirees)

Planning an estate

Peace of mind & expert support in making the right choices
(Complex situations | Optimization | Guidance)

Settling an estate

Guidance during one of life’s toughest moments
(Saving time & money | end-to-end support)

Services for every situation

ClearEstate is the only platform offering services across all levels of wealth

Thorough services that are:

Affordable
⅓ cost of traditional providers

Streamlined
Proprietary tech makes it easy

Personalized
Guidance and support from experts for when you really need it

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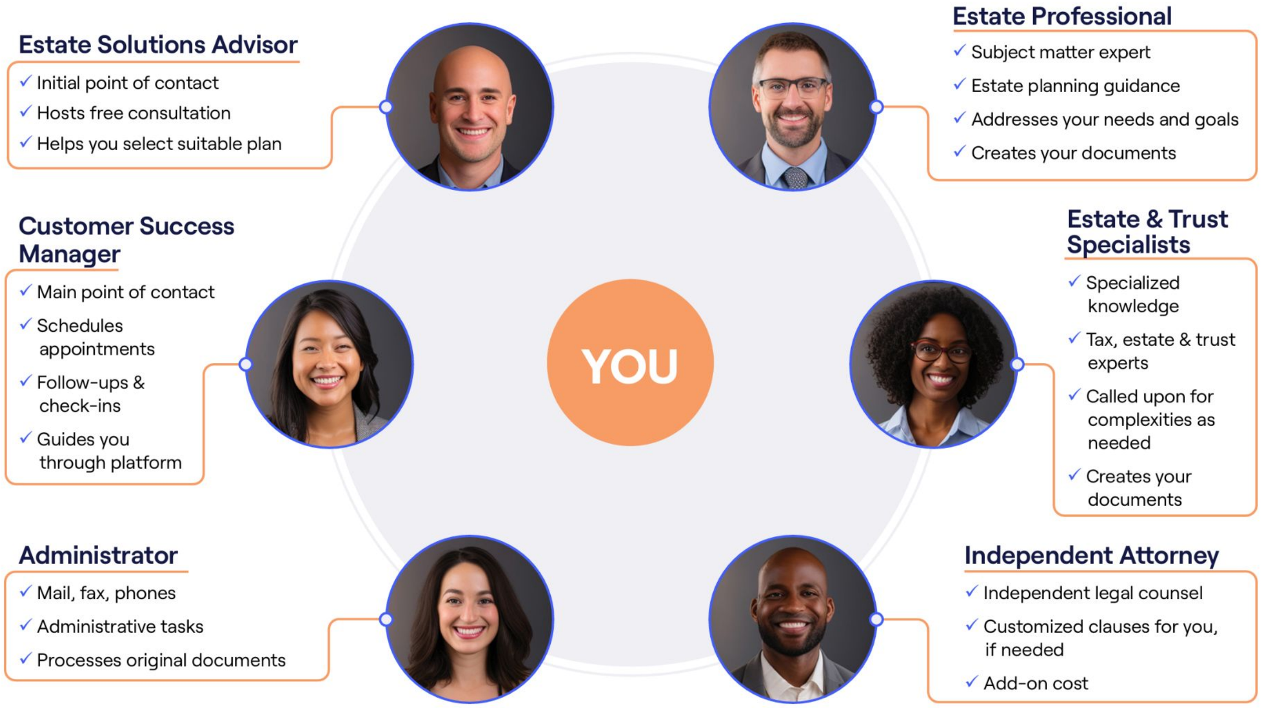
End-to-end Support

Personalized **guidance & support** from estate experts will help you reach your goals confidently and with clarity.



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Estate Planning is more than just creating a will

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Consultation Process

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01

We will book your free consultation with ClearEstate

02

A ClearEstate Solutions Advisor will review your estate planning needs

03

Your ClearEstate Solutions Advisor will send you a proposal that suits your needs

04

After review and sign up, you will gain access to the ClearEstate platform and be introduced to your team of Estate Professionals to begin the planning process

It's not just an estate.
It's your legacy.
Make the most of it.

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Your Estate Planning Journey

Today | Initial Consultation + Sign Up

Day 2 | Intake Meeting [60 mins]

Day 9 | Guidance Meeting [60 mins]

Day 10-14 | Development of Will & Upload POAs [2-4 hrs]

Day 15 | Review & Sign Your Will [30 mins]

Annual Meeting | Annual Estate Plan Review

Your Estate Planning Journey (detailed)

Today | Initial Consultation + Sign Up
You will meet with an Estate Solutions Advisor to explore our solutions and select the right estate plan to meet your needs, and help you set up your account in the ClearEstate platform

Day 2 | Intake Meeting [60 mins]
In this meeting you will meet your Customer Success Manager. We will review the main considerations and your goals for your estate plan, and prepare you for your Guidance meeting.

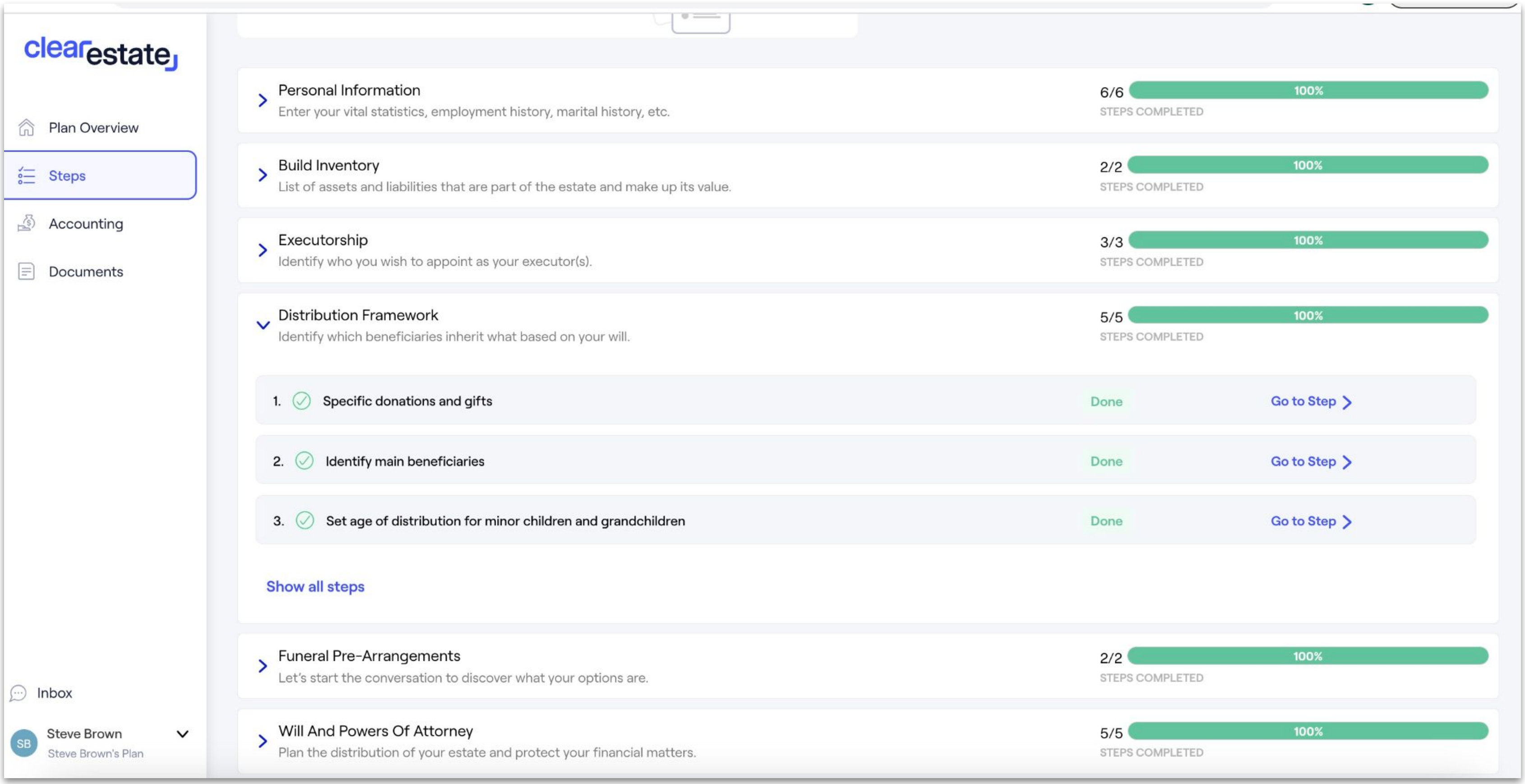
Day 9 | Guidance Meeting [60 mins]
Your Estate Plan Advisor will provide expert guidance and directions for developing your will, considering the key factors needed to create a comprehensive and tailored plan.

Day 10-14 | Development of Will & Upload POAs
The ClearEstate team will develop your will and incorporate all key considerations that you discussed during your Guidance session, and will upload documents to the ClearEstate platform.

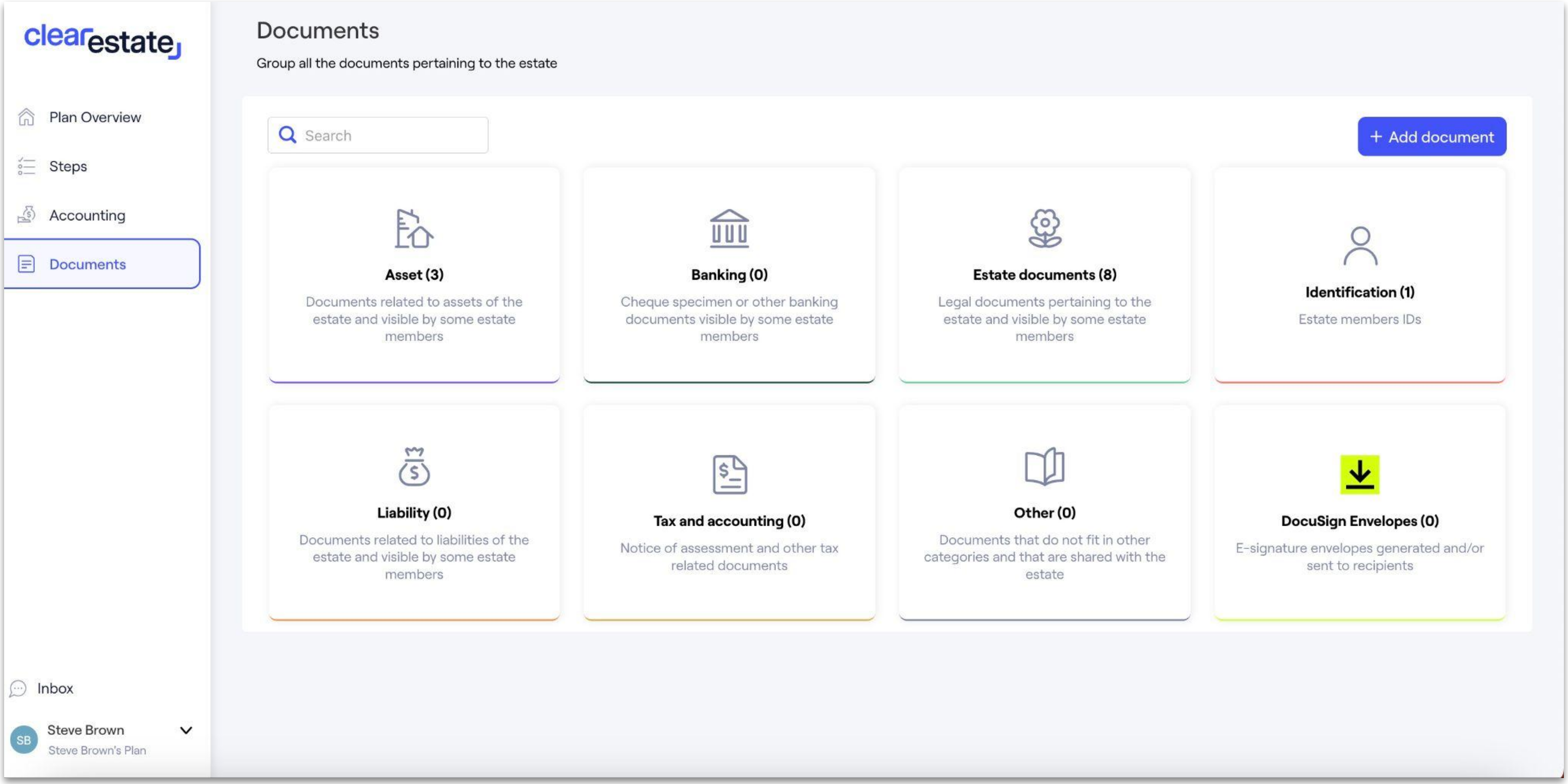
Day 15 | Review & Sign Your Will [30 mins]
You'll meet with your Estate Plan Advisor to review your final will to be signed.

Annual Estate Plan Review
Discuss any major life changes and make necessary updates to your will

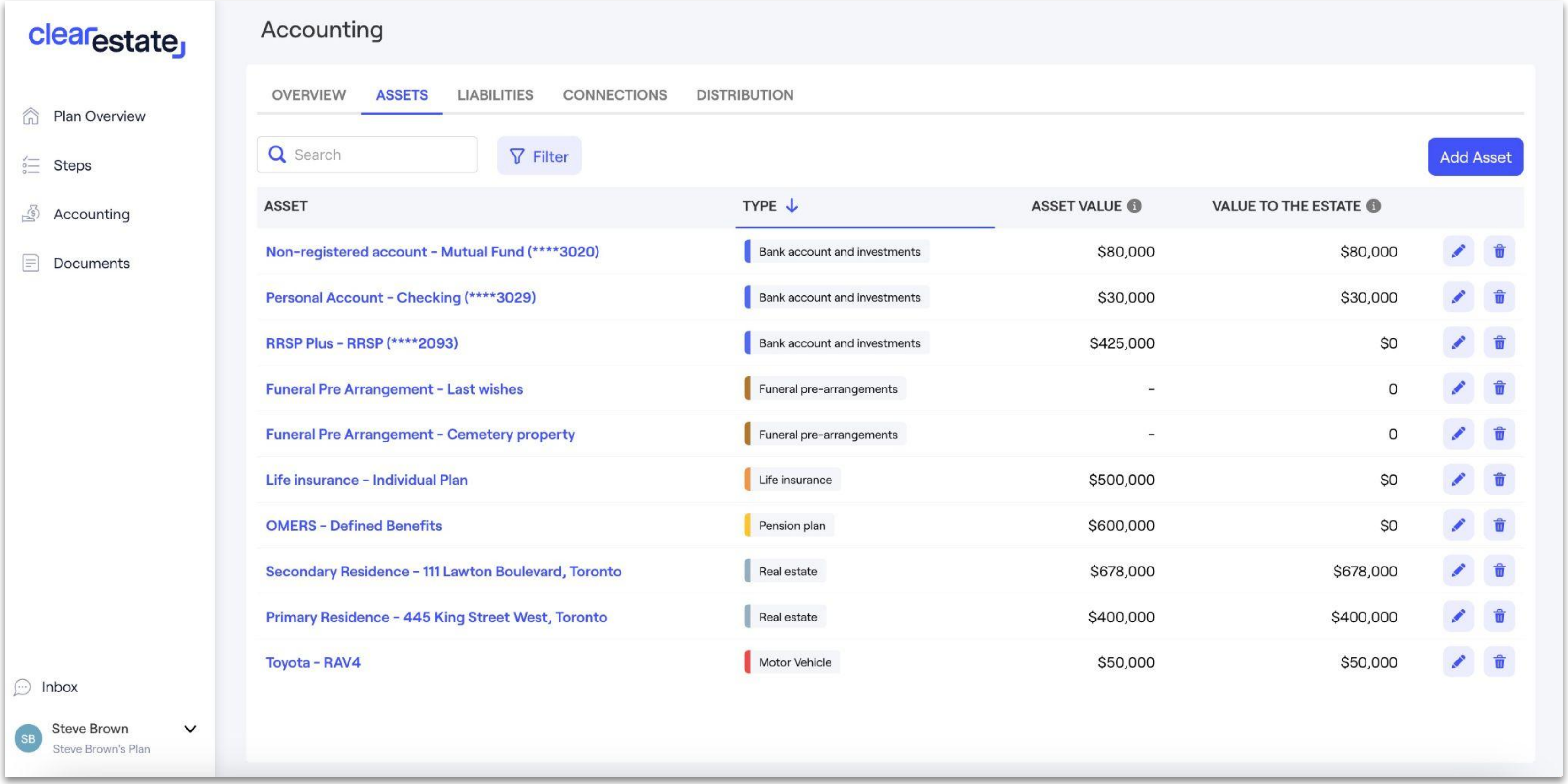
Easy to Follow Progress Steps



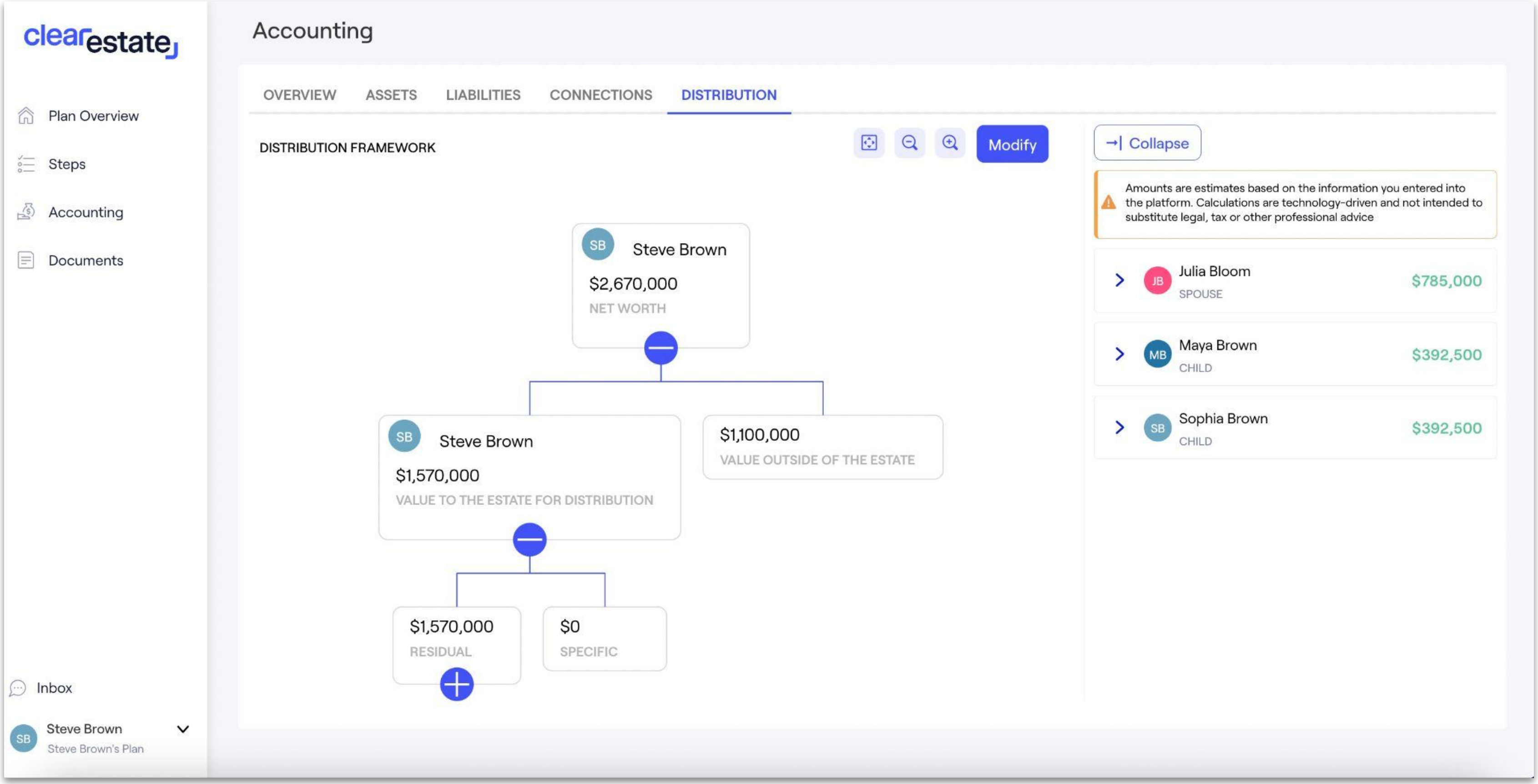
Secure Digital Storage Vault



Build Your Inventory of Assets and Liabilities



Visualized Estate Distribution Plan



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Professional Executor Services

- ClearEstate's trust partner* as executor and ClearEstate as agent to professionally manage estate settlement
- Alleviates significant liability and burden from your family
- Ease and efficiency for you and your loved ones
- Expertise in estate planning and settlement
- Continuity of professionals
- Affordable and accessible
- Independent and impartial
- Can address complex needs and strategies
- Support and transparency for your loved ones
- Helps you leave the legacy you intend

* Natcan Trust Company, a wholly-owned subsidiary of National Bank of Canada.

Estate Planning

Individual / Couples *Annual Fee*	Online Will $249 *+ $19 yr*	Basic $595 / $795 *+ $19 yr*	Complete $1,995 / $2,995 *+$99 yr*	Most Selected Professional $3,995 / $4,595 *+$129 yr*
ClearEstate online platform - estate planning dashboard, connect & track financial accounts, net worth tracker, document builder, document storage	✔	✔	✔	✔
Create your last will and testament	✔	✔	✔	✔
Create your power of attorney for property & personal care	✔	✔	✔	✔
Information access for your executor when you pass away	✔	✔	✔	✔
Distribution tree - visualize your distribution plan		✔	✔	✔
Assistance from our Customer Support Team		✔	✔	✔
Estate plan optimization with multidisciplinary experts - review of goals, impact of probate, tax considerations, family dynamics, etc.			✔	✔
Add-on services available based on your needs and circumstances			+$	+$
Estate Plan Report - review a summary of your plan			✔	✔
*Professional executor appointed in your future estate settlement				1% of FMV** at settlement
*Professional POA for property appointed in case of incapacity (optional)				1% of FMV if activated
Storage of original will and PoA for Property				✔

*All prices are subject to change without notice and are not guaranteed, unless the selected plan has already been paid. Professional plan requires your appointment of Natcan Trust Company, a wholly-owned subsidiary of National Bank of Canada, as your executor, with ClearEstate as agent. **FMV = gross fair market value of assets under administration, subject to a minimum of $15,000.*

Add-ons available for Complete & Professional Plans only, in Canada (excl. QC)*

Estate Planning

For Advanced Needs

	Add-ons for Complete or Professional Plan
Corporations - Estate planning considerations for a **standard complexity corporation**	**Per corporation** $295
Corporations - Estate planning considerations for a **medium complexity corporation**	**Per corporation** $595
Advanced Planning - Tier 1 - Review with your Estate Plan Advisor, any of the following estate planning needs: - Equalizing gifts during your lifetime in your estate - Addressing digital assets such as cryptocurrency, online accounts, etc. - Considering elaborate alternate beneficiary scenarios - Reviewing compensation for your executor - Establishing a trust for the maintenance of your pet/s - Other advanced (non-trust) needs	$445 *+$100 per provision drafted by independent lawyer*
Advanced Planning - Tier 2 - Review with your Estate Plan Advisor, any of the following use of trusts upon your death: - A trust for a beneficiary with a disability - A trust for your spouse with beneficiaries of your choosing upon their death - A trust to hold real estate for one or more beneficiaries - A trust for proceeds of registered plans or life insurance - A wealth protection trust for the next generation/s - A charitable giving trust for your philanthropic intentions - Other advanced trust needs	$795 *+$150 per provision drafted by independent lawyer*
Multiple Wills - Create a secondary will in the same jurisdiction (to avoid probate on private companies shares, etc.)	*+$200-500 per will drafted by independent lawyer*
Multiple Wills - Create a secondary plan for assets in a different jurisdiction** (to expedite your estate settlement)	*+$200-$500 for initial document drafted by independent lawyer*

**ClearEstate's Independent Attorney Network (CEIAN) provides legal drafting services for ClearEstate customers. Any additional documents that may be recommended may be subject to an additional fee. Discounts cannot be applied to independent lawyer fee. **Secondary will must be in a jurisdiction supported by ClearEstate.*

Your Next Step is Clear

Have questions or need help?

Contact your Consultant or visit clearestate.com

Trustpilot

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