clearestate

CANADA (EXCLUDING QC)

Guided estate planning

ClearEstate helps you safeguard your wealth, optimize taxes, and ease the burden on loved ones, for lasting peace of mind.

Our Estate Professionals offer transparent, one-on-one support to build a holistic plan aiming to maximize what you leave behind, transfer assets efficiently, and cover executorship, guardianship, and distribution, in your beneficiaries' best interests.

Your plan lives securely on the ClearEstate platform, alongside your distribution plan and family tree, with an intuitive dashboard and online chat support.



MOST POPULAR

	Core	Professional*
Price[1] – Individual plan	**$2,125**	**$4,125**
Price[1] – Couple's plan	**$3,125**	**$4,995**
Annual fee	**$99/yr**	**$129/yr**
Create your last Will and testament**	✓	✓
Create your Power of Attorney for property & personal care**	✓	✓
Estate planning guidance with an Estate Plan Advisor Optimization with multidisciplinary experts: goals, impact of probate, tax considerations, and family dynamics	✓	✓
Estate Plan Report summarizing your plan	✓	✓
Annual plan review with an Estate Plan Advisor	✓	✓
Professional executor appointed in your future estate settlement* Fee: 1% of FMV*** at settlement	-	✓
Professional PoA for property appointed in case of incapacity* Fee: 1% of FMV*** if activated	-	✓
Enhanced estate planning add-ons based on your goals See page 2 for details	+$	+$
Transcribing your personal, financial and contact information	+$	+$
Storage of original Will & PoA for property	-	✓

MOST COMPREHENSIVE

Signature* plan

ClearEstate's most comprehensive plan, with full support and guidance.

Includes everything in the Professional plan, plus:

- ✓ Enhanced estate planning add-ons
  Trusts, secondary wills, blended family considerations, and more. See page 2.
- ✓ Data transcription
- ✓ A guided family meeting
- ✓ Signing coordination

Individual plan	$6,995[1]
Couple's plan	$8,795[1]
Annual fee	$249/yr

*Professional and Signature plans require your appointment of Natcan Trust Company, a wholly-owned subsidiary of National Bank of Canada, as fiduciary. ClearEstate acts solely as agent and is not a trust company. The Signature plan is not available in Quebec. **Testamentary documents are generated by the ClearEstate platform using standardized templates reviewed by lawyers. If legal advice or additional drafting is required, ClearEstate's Independent Attorney Network (CEIAN) will provide it as an add-on service. ClearEstate does not provide legal advice and is not a law firm. ***FMV = gross fair market value of assets under administration, subject to a minimum of $16,000. Trust and PoA administration subject to an annual fee of 0.75%, minimum $6,000. [1]All prices are expressed in Canadian dollars, are subject to change without notice, and are not guaranteed unless the selected plan has been paid.

Book a free consultation

Visit clearestate.com or speak to your advisor about contacting ClearEstate

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Enhanced planning add-ons

Enhanced planning add-ons are available based on your needs. Add-ons are included in the Signature plan. They can be added to a Core or Professional plan at the following rates:

Corporations Estate planning considerations for a standard complexity corporation	**Per corporation** **$325**
Corporations Estate planning considerations for a medium complexity corporation	**Per corporation** **$625**
Enhanced planning, Tier 1: Review with your Estate Plan Advisor, how the following may impact your estate: » Domestic or other agreements in relation to your estate plan » Addressing digital assets such as cryptocurrency, online accounts, etc. » Reviewing compensation for your executor » Other enhanced (non-trust) needs » Equalizing gifts during your lifetime in your estate » Considering elaborate alternate beneficiary scenarios » Establishing a trust for the maintenance of your pet(s)	**$465**
Enhanced planning, Tier 2: Review with your Estate Plan Advisor, how the following may impact your estate: » Blended family considerations » A trust for your spouse with beneficiaries of your choosing upon their death » A trust for proceeds of registered plans or life insurance » A charitable giving trust for your philanthropic intentions » A trust for a beneficiary with a disability » A trust to hold real estate for one or more beneficiaries » A wealth protection trust for the next generation(s) » Other enhanced trust needs	**$825**
Multiple wills Create a secondary Will in the same jurisdiction for probate savings, if applicable.	**$525 individual** **$725 couples**

Where highly customized drafting or additional documents are required, additional fees may apply. ClearEstate's Independent Attorney Network (CEIAN) provides legal drafting services for ClearEstate customers as add-on services.

About our annual fees

Your goals, your family, and your wealth change over time, and your estate plan should keep pace. That's why every guided estate plan includes an annual review with an Estate Plan Advisor: a meeting to reassess your plan against your current personal and financial picture and make whatever updates it needs.

The annual fee also provides ongoing, 24/7 access to the ClearEstate platform. There, you can store your documents, connect your financial accounts, build a complete inventory of your assets and liabilities, track your net worth, view your estate distribution plan, and reach our support team through online chat when you have a question.

