Your Estate Planning Journey

Planning your estate with ClearEstate will safe-guard your wealth, minimize taxes, and ease the burden on loved ones when the time comes. Here's how it works:

Today | Initial Consultation + Sign Up

You will meet with an Estate Solutions Advisor to explore ClearEstate's solutions and select the right estate plan to meet your unique needs. We will then 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 your goals, main considerations for your estate plan, and prepare you for your Guidance meeting.

Day 9 | Guidance Meeting [60 mins]

Your Guidance meeting is where you get expert advice and guidance on the considerations for developing your will. Your Estate Plan Advisor will provide you with direction to ensure you are comfortable and confident in all of your decisions.

Day 10-14 | Development of Will & Upload POAs

Your Estate Plan Advisor and the Administrative team at ClearEstate will be working hard behind the scenes to develop your will and incorporate all key considerations that you discussed during your Guidance session. They will upload documents to the ClearEstate platform so you can review & sign them.

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 Meeting | Annual Estate Plan Review

This annual review meeting is where you will meet with your Estate Plan Advisor to discuss any major changes in your life that can impact your overall estate plan, or discuss upcoming changes that you want to incorporate into your will.

Timeline is approximate and dependent on you completing steps in the ClearEstate platform.

It may take longer if customized drafting by an independent attorney is required.

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

clearestate

Your Estate Planning Team

Our team will provide transparent, one-on-one support to help you build a holistic estate plan in our modern, user-friendly online platform.

Estate Solutions Advisor

- ✓ Initial point of contact
- ✓ Hosts free consultation
- ✓ Helps you select suitable plan

Estate Professional

- ✓ Subject matter expert
- ✓ Estate planning guidance
- ✓ Addresses your needs and goals
- ✓ Creates your documents

Customer Success Manager

- ✓ Main point of contact
- ✓ Schedules appointments
- ✓ Follow-ups & check-ins
- ✓ Guides you through platform

YOU

Estate & Trust Specialists

- ✓ Specialized knowledge
- ✓ Tax, estate & trust experts
- ✓ Called upon for complexities as needed
- ✓ Creates your documents

Administrator

- ✓ Mail, fax, phones
- ✓ Administrative tasks
- ✓ Processes original documents

Independent Attorney

- ✓ Independent legal counsel
- ✓ Customized clauses for you, if needed
- ✓ Add-on cost

It's all in the vault.

Your expertly-crafted estate plan is securely stored in a state-of-the-art online platform, where you can:

- » Store, protect and organize important information and documents
- » Connect your financial accounts for real-time balances
- » Build your inventory of assets and liabilities and track your net worth at a glance
- » View an interactive, visual estate distribution plan
- » Chat with dedicated Estate Professionals

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