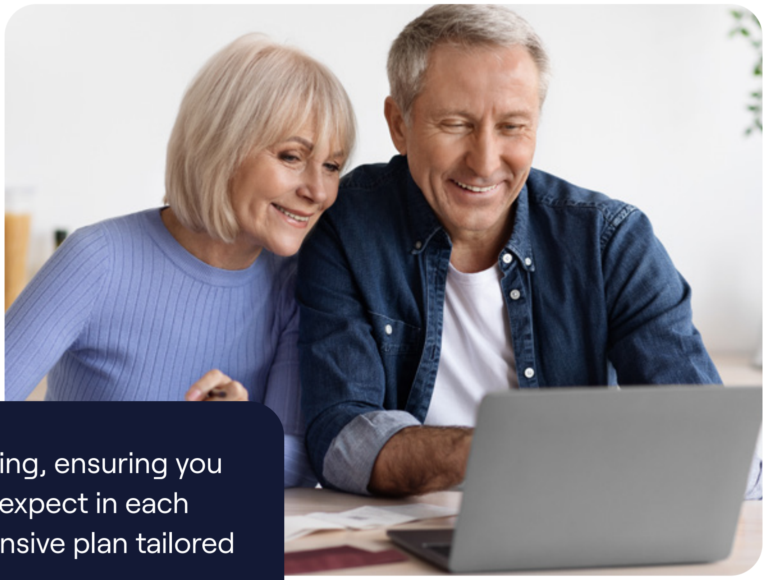
Your Estate Planning Journey

Preparation Checklist



ClearEstate's 3-step process simplifies estate planning, ensuring you feel confident every step of the way. Here's what to expect in each meeting as we work together to create a comprehensive plan tailored to protect your legacy and your loved ones.

1. Intake

At this stage, you'll meet virtually with your Customer Success Manager and we'll gather detailed information about your assets, family members, and other parties involved in your estate to ensure thoughtful, comprehensive guidance. A clear understanding of who and what we're planning for allows us to tailor our approach to your unique needs.

Come prepared with:

- ☐ Personal information: addresses, employment history, family information, marriage certificate
- ☐ Assets: Banking information; Real estate information, art, jewelry, anything of value
- ☐ Liabilities: Mortgage, credit cards, loans, lines of credit
- ☐ Identify: Who do you want to name as executor; Who are your beneficiaries; Who you want to name as Powers of Attorney
- ☐ Identify: Your desired fund distribution; If you require any trusts

Then:

- ☐ Book guidance meeting with your ClearEstate Estate Plan Advisor

Timeline: Approximately 2-3 days after sign-up

2. Guidance Meeting (60 Minutes)

In your guidance meeting, you'll meet with your Estate Plan Advisor to discuss your unique needs and wishes for a personalized estate plan, such as whether you need a secondary will or a spousal trust.

From family dynamics and minor beneficiaries to business interests, charitable contributions, and assets in other provinces, we'll address the key factors needed to create a comprehensive and tailored plan.

Working together in this meeting, you will make the following decisions:

- ☐ Name your executor and an alternate executor
- ☐ Name your Power of Attorney for property and an alternate; Name your Power of Attorney for personal care and an alternate
- ☐ Designate your beneficiaries and alternate beneficiaries
- ☐ Determine fund distribution
- ☐ Discuss potential estate and income tax implications
- ☐ Discuss options for any gaps or uncertainties

These decisions will determine the final outcome of your estate plan.

Timeline:
Approximately 9 days after sign-up

Days 10 to 14

Your Estate Plan Advisor and Administrative team at ClearEstate will be working hard behind the scenes to develop your will and incorporate all key considerations that you discuss in your guidance meeting. They will upload documents to the platform so you can review & sign.

3. Review Meeting (30 Minutes)

You'll meet with your Estate Plan Advisor to review your final will. We'll review your estate plan and documents to ensure they align with your wishes and that you fully understand each step. We'll then guide you through executing your planning documents, ensuring your comprehensive estate plan is complete and ready.

- ☐ Identify 2 disinterested witnesses to sign your documents
- ☐ You'll be provided with jurisdiction-specific signature/execution instructions
- ☐ Upload a copy of the will onto the platform

Annual Estate Plan Review

The 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. This way, you'll feel confident that your plan will always be up-to-date and reflective of your situation and goals.