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 and our notary partner 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 show you the portal, review your goals and walk you through the important intake process ahead of your Guidance meeting with our notary partner.

Day 9 | Guidance Meeting [60 mins]

Your Guidance meeting is where you get expert advice and guidance on the considerations for developing your will. The notary partner 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

The notary partner, using the information provided during the meeting and the information entered in your vault, will be working hard behind the scenes to develop your will and incorporate all key considerations that you discussed during your Guidance session.

Day 15 | Review & Sign Your Will [120 mins]

You'll meet in person with the notary partner to review your will in its entirety and then sign it in their presence.

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, and discuss whether you need to make updates to your will with our notary partner.

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.

If the Guidance or Review meetings exceed the allotted time, additional time will be billed at the standard hourly rate.

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.

YOU

Estate Solutions Advisor

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

Estate Professional

- ✓ Guides you through the portal
- ✓ Answers any questions you may have on the process
- ✓ Keeps you up to date with the full process
- ✓ Provides clarity to you and the notary when needed

Customer Success Manager

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

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

Notary Partner

- ✓ Subject matter expert
- ✓ Estate planning guidance
- ✓ Creates your documents

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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