

Estate Planning Services



ClearEstate's transformative approach to estate planning ensures that you're prepared today to offer lasting peace of mind for tomorrow. Planning your estate with ClearEstate will safeguard your wealth, minimize taxes, and ease the burden on loved ones when the time comes.

Our team of Estate Professionals will provide transparent, one-on-one support to help you build a holistic estate plan. Our specialists will outline planning strategies to maximize what you leave behind and ensure an efficient

transfer of your assets to your beneficiaries. We'll guide you to make informed decisions about executorship, guardianship, distribution and more, with your goals and your beneficiaries' best interests in mind.

Your expertly crafted estate plan is securely stored in a modern, user-friendly online platform. All information tied to the planning of the estate, the eventual distribution plan and even a family tree is displayed in an easy-to-use dashboard.

Estate Planning (Quebec)

	Complete	MOST SELECTED Professional
Retail price ¹ : Individual/Couple	\$1,995/\$2,995	\$3,995/\$4,595
Annual Fee ²	+\$99 yr	+\$129 yr
ClearEstate online platform: estate planning dashboard, connect & track financial accounts, net worth tracker, document builder, document storage	✓	✓
Notarial will*	✓	✓
Protection mandate*	✓	✓
Distribution tree - visualize your distribution plan	✓	✓
Assistance from our Customer Support Team	✓	✓
Annual estate plan review with an Estate Professional	✓	✓
Professional guidance from our Estate Professionals: Estate plan optimization with multidisciplinary specialists – review of goals, impact of probate, tax considerations, family dynamics, etc.	✓	✓
Estate Plan Report - review a summary of your plan	✓	✓
Add-on services available based on your needs and circumstances*	+\$	+\$
Professional liquidator 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

¹All prices are subject to change without notice and are not guaranteed, unless the selected plan has already been paid.

*In Quebec, the drafting of notarial wills and protection mandates is provided by ClearEstate's independent notary partner, Cain Lamarre. Discounts cannot be applied to 3rd party services.

**Professional plan requires your appointment of Natcan Trust Company, a wholly-owned subsidiary of National Bank of Canada, as your liquidator, with ClearEstate as agent.

***FMV = gross fair market value of assets under administration. Subject to a minimum of \$15,000.

ClearEstate’s estate planning services are offered in collaboration with Cain Lamarre, one of Quebec’s leading notarial law firms. Below, you’ll find their pricing information for the following estate planning services:

	Price*	Provision
Addition of a clause addressing specific digital assets (e.g., cryptocurrencies, etc.)	Hourly rate \$325 to \$450	
Addition of a basic clause/scenario for specific bequests or alternate beneficiaries, including a single draft	\$175	By clause
Addition of a complex clause/scenario for alternate legatees or beneficiaries, including multiple drafts	Hourly rate \$325 to \$450	
Clause regarding compensation for your liquidator, administrator, or trustee, beyond reimbursement of expenses and lost wages, or different from the standard National Bank Trust clause	\$175	By clause
Any time exceeding the one-hour orientation meeting with Cain Lamarre	Hourly rate \$325 to \$450	
Any drafting needs beyond standard provisions (e.g., conditional bequests, purchase of an annuity, etc.)	Hourly rate \$325 to \$450	
Any meetings or communications with third parties, including your professionals (advisors, notary, lawyer, tax specialist, accountant, etc.)	Hourly rate \$325 to \$450	
Trusts		
Exclusive trust for the spouse with staggered distributions to the children (from within the trust)	\$2,500	
Exclusive trust for the spouse with immediate distribution to the children (outside the trust)	\$2,500	
A specific bequest to the spouse and a trust for the children in the event the spouse predeceases.	\$2,500	
Any other trust-related need or if deviating from the above standards	Hourly rate \$325 to \$450	
Companies		
Estate planning considerations for a corporation, particularly regarding taxation	Hourly rate \$325 to \$650	
Other		
Advance Medical Directives (AMD)	\$275	By person

*Prices are subject to change. Discounts cannot be applied to Cain Lamarre’s fees.



²About our annual fees

The annual estate plan fee gives you 24/7 access to the ClearEstate platform, where you can store documents, link financial accounts, track your net worth, and view your visual estate plan. It also includes a yearly review with an Estate Professional to ensure your plan stays current and aligned with your needs.

The annual fee does not include new drafting and notarization of documents.