

The only resource you need to plan your estate.

Why plan your estate with ClearEstate?

- Fully online service saves you time and makes it easy to work with your advisor.
- Estate planning & administration is all we do at ClearEstate.
- Provision of Wills, Trusts, Powers of Attorney, Mandates and Personal Representative Agreements.
- Online access and support for your future executor.



Why choose a professional executor or trustee?

- An executor's job often lasts for a minimum of 16 months. The commitment of a trustee can last decades.
- Ensure unbiased, trained professionals are handling your estate.
- Relieve the burden from family members and protect relationships that can be broken during estate settlement.
- Save your family thousands of dollars in the future.



How does this save me money?

The following is a cost comparison of settling an estate with a personally appointed Executor, a Bank Trust as Executor, or with ClearEstate.*

	Individual (5%) up to	Bank Trust (4%)	ClearEstate (1%)
Settlement fee	\$50K	\$40K	\$10K
Probate application	\$6,000	\$5,000	Included
Tax prep fees (Terminal T1, First T3 and Clearance Certificate)	\$3,000	\$3,000	Included
Appraisals & other disbursements (est. 1%)	\$10K	\$10K	\$10K
Total cost to the estate	\$69K	\$58K	\$20K
Net estate value	\$931K	\$942K	\$980K

Estate Planning Services start at \$595 for individuals and \$795 for couples.

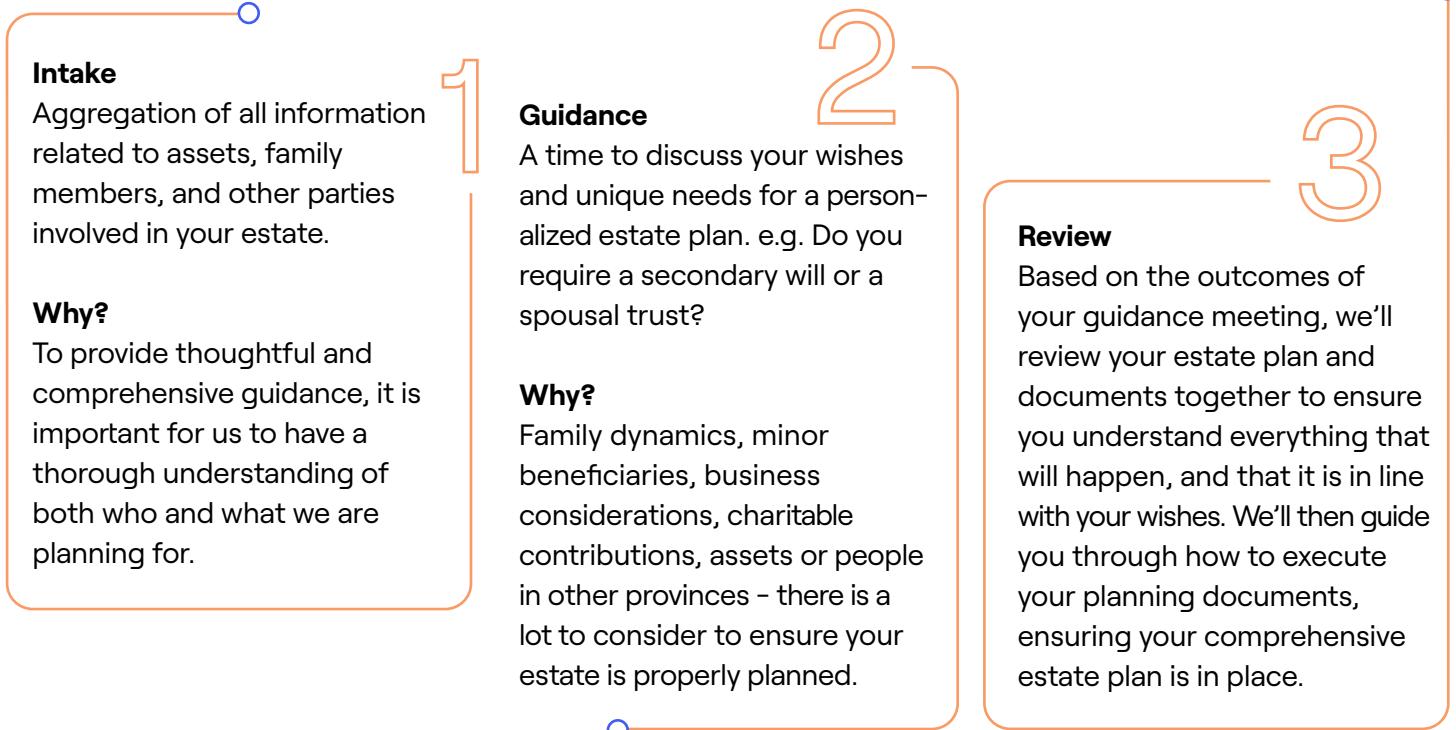
Professional Plans (including access to professional executor services) for individuals from \$3,995 and for couples from \$4,595.

Additional fees apply for secondary wills, multiple jurisdictions, corporate/business planning, and trusts.

*Estimates based on a \$1M estate. The above is a sample illustration only. Estate settlements will vary based on a variety of factors.

Prepare today for peace of mind tomorrow

Planning your estate with ClearEstate is easy as 1... 2 ... 3!



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.

The dashboard provides a comprehensive overview of the estate plan, including:

- BALANCE:** Value to the estate assets & liabilities (\$491,000 total, -\$9,000 in taxes, \$392,000 total).
- ESTATE MEMBERS:** Beneficiaries (Catherine Michel, Jake Doe, Joe Doe) and their estimated values (\$25,000, \$17,440, \$9,750).
- MY CLEARESTATE TEAM:** Carl, Estate Administrator.
- RECENT DOCUMENTS:** Document names (e.g., Document_name.pdf, Document_name.jpg, Document_name.png).
- MESSAGES:** An inbox with a message from the AI bot: "You are all caught up!"

Estate planning online tool

Shows all information tied to the planning of the estate, the eventual distribution plan and even a family tree, all displayed in an easy to use dashboard.

Clear distribution tree

Allows you to easily see exactly what will happen with your estate upon your passing.

The distribution tree visualizes the inheritance plan:

- The estate total is \$392,000.
- Specific bequests: \$37,500 to Paul Doe (\$350,000 AMOUNT), \$25,000 to Jake Doe (COTTAGE), \$17,000 to Joe Doe (RESIDUAL).
- Residuary bequests: \$5,667 to Paul Doe (\$3,333 AMOUNT), \$3,778 to Jake Doe (\$2,222 AMOUNT), \$3,778 to Joe Doe (\$2,222 AMOUNT).
- Amounts: \$355,667.