

# Estate Planning Services

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Prepare today for peace of  
mind tomorrow



## Your values. Your goals. Your legacy.

Your hard-earned wealth tells your unique story, and at ClearEstate, we respect that.

Elevate your estate planning with strategies that will safeguard your wealth, minimize fees, and ease the burden on loved ones.

Our team of Estate Professionals will provide transparent, one-on-one support to help you build a holistic estate plan in our modern, user-friendly online platform. We'll outline planning strategies to maximize what you leave behind and ensure an efficient transfer of your assets to your beneficiaries.

When the time comes, your estate executor will be able to call on us to guide them on the best path to estate settlement.

### 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
- Create your Will and power of attorney documents
- View an interactive, visual estate distribution plan
- Chat with dedicated Estate Professionals



## Book a consultation

Visit [clearestate.com/ACPI](https://clearestate.com/ACPI) or speak to your advisor about contacting ClearEstate.

## 3 plans to suit estates of all sizes and complexities

### Basic

#### Create your Will and Power of Attorney documents in a secure digital platform

- Assistance from our Customer Support Team
- 24/7 online platform access, including:
  - » Estate planning dashboard
  - » Create your inventory of assets and liabilities
  - » Link financial accounts for real-time tracking
  - » Interactive, visualized distribution plan

*Ideal for those with simple assets and distribution plans. No add-on services available.*

### Complete

#### Get expert support to create your optimized estate plan

- Professional guidance from our Estate Professionals, with access to multidisciplinary experts to optimize your plan
- Review your goals and consider impact of probate, tax implications and family dynamics
- Online platform access, including:
  - » Everything in the Basic plan
  - » Estate Plan Report
  - » Online chat support

*Add-on services available.*

### Professional\*

MOST SELECTED

#### Get expert support to create your optimized estate plan with a professional executor named for your estate settlement

- Professional guidance from our Estate Professionals, with access to multidisciplinary experts to optimize your plan
- Professional executor appointed in your Will
- Professional POA for property appointed in case of incapacity (optional)
- Storage of original Will and POA document
- Your estate will be professionally settled when the time comes

*Add-on services available.*

*\*Professional plan requires your appointment of Natcan trust Company, a wholly-owned subsidiary of National Bank of Canada, as your executor.*



Get advice from our experts,  
maximize your legacy, and  
protect your family.

[clearestate.com](https://clearestate.com)

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