

clearestate_®

Settle an estate with
convenience and confidence
with **ClearEstate**.

Estate Settlement Services



Estate Settlement Services

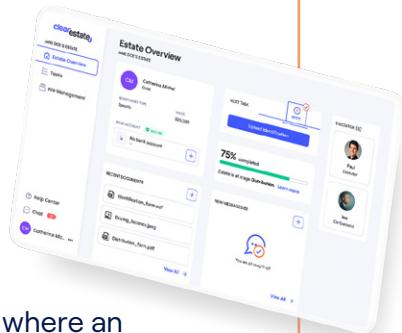
In times of grief, navigating estate settlement can be emotionally draining. We support families by easing the burden of estate administration with the help of time-saving technology and dedicated estate professionals.

Navigate estate settlement confidently on our easy-to-use online platform and with the help of our specialized team.



What we do, with heart and expertise

We'll guide you from applying for probate and filing the right paperwork to taking care of taxes and closing the estate.



Simply start with a 30-minute consultation where an estate specialist will ask you a few questions to better understand your situation and guide you on your best path forward.

We'll show you how we can save you hundreds of hours of paperwork, thousands of dollars in fees, and countless headaches.

All at $\frac{1}{3}$ the cost of traditional routes.

Book a **consultation**

Visit clearestate.com/ACPI or speak to your advisor about contacting ClearEstate.

4 plans to suit estates of all sizes and complexities

Essential

For executors or estate representatives seeking support with probate.

- Professional guidance and support
- Online estate portal access, including:
 - » Estate overview and accounting dashboards
 - » Link to existing and/or estate accounts for live accounting, where possible
 - » Inventory of assets & liabilities
- Automated form filling
- Probate application prepared for submission to court
- Ongoing support until grant of probate

Plus

Everything in the Essential plan, plus:

- Access to online beneficiary portal
- Tax filings: ClearEstate prepares standard final tax returns
 - » Terminal T1 (final individual return for year of death)
 - » First estate T3

MOST SELECTED

Complete

Everything in the Plus plan, plus:

- Continued support after probate
- Clearance certificate application
- Guided discovery of assets & liabilities
- Communication with third parties
 - » Financial institutions: up to 20hr for notifications and follow-ups
 - » Other third parties: up to 10hr for notifications + 2 written follow-ups/ea
- Estate transaction report (if possible)

Professional*

ClearEstate acts as agent and its trust partner acts as estate representative to settle the estate

- ClearEstate handles all communications with third parties and beneficiaries
- Data entry of all estate information
- ClearEstate carries out necessary steps to settle estate (typically 200+ hours over 12-24 months)

*Professional plan is subject to review and approval of ClearEstate's trust partner (Natcan Trust Company, a wholly-owned subsidiary of National Bank of Canada) and court acceptance. Estates must be solvent and free from claims in order to qualify.



Your dependable, all-in-one hub
for probate support and end-to-
end estate settlement solutions.

clearestate.com

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