



Settling an estate means lawyers,  
accountants, repetitive paperwork,  
a lot of time and a lot of money.

Or, ClearEstate.



## Estate Settlement Services

Knowing how to settle an  
estate isn't just something  
you know.

We've thought ahead, so you  
can take it one step at a time.

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

Request a free consultation  
[clearstate.com/abcu](https://clearstate.com/abcu)



## Estate Settlement Services

Dealing with the grief of losing a loved one is emotionally exhausting and it's not the time to be learning complicated estate settlement processes as you go.

We support families by completely removing estate administration from their concerns by delivering transparent estate settlement solutions through the combination of highly trained professionals and state-of-the-art technology.



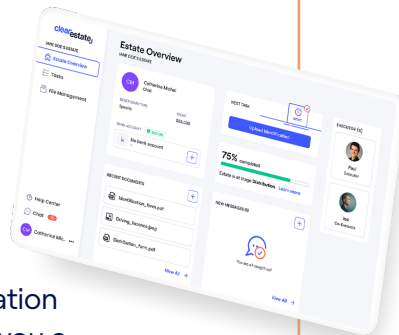
### What we do, with heart and expertise

We do all the work; we handle probate, tax filing, government agencies and financial institutions relation, and so much more.

Simply start with a free, 30-minute consultation where our Estate Solutions Advisors 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 1/3 the cost of traditional routes.



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

### Essential

#### For executors seeking help to settle an estate

- Dedicated Estate Professional
- Online estate portal access, including:
  - » Estate overview and accounting dashboards
  - » Link to existing and/or estate accounts for live accounting, where possible
- Automated form filling
- Guided discovery of assets & liabilities
- Probate application prepared for submission to court
- Attorney-reviewed probate application, if required
- Ongoing support through probate and for the duration of the estate settlement

### Plus

#### Everything in the Essential plan, plus:

- Access to online Beneficiary portal
- Tax filings: ClearEstate prepares and files standard final tax returns and estate tax returns

### Complete

#### Everything in the Plus plan, plus:

- Data entry of assets & liabilities
- Representation 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/each
- Estate transaction report, where possible

MOST SELECTED

### Professional Executor

#### Everything in the Complete plan, plus:

- ClearEstate's fiduciary partner appointed as estate representative and ClearEstate acting as agent to professionally manage the estate settlement
- Estate settlement support for up to 2 jurisdictions
- Data entry of all estate information
- Up to 50 hours of communication with financial institutions and 25 hours with other third parties

Book your **free consultation**

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