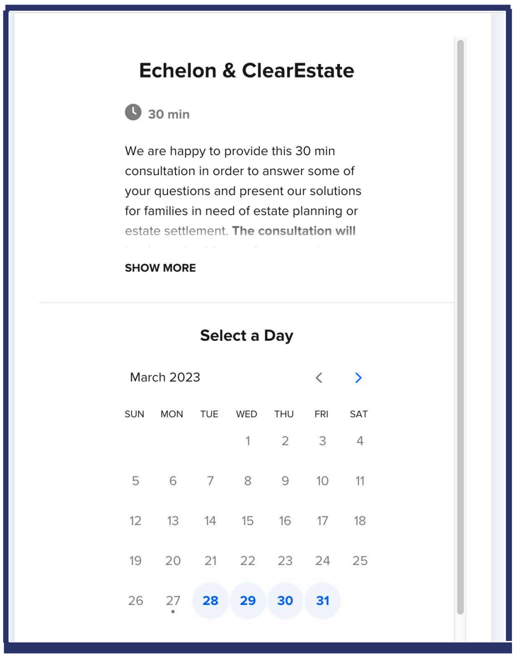
clearestate

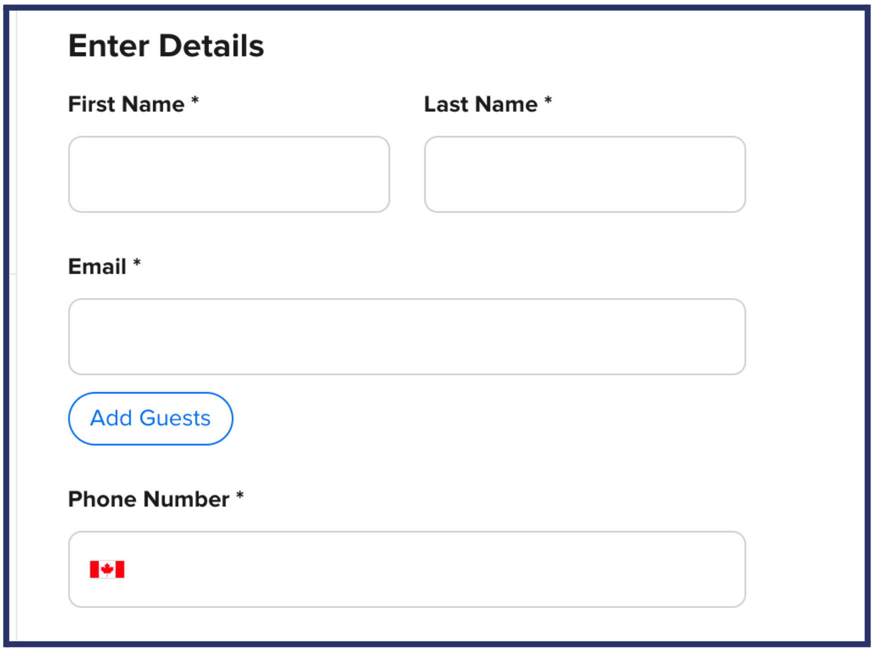
Step by Step Consultation Booking Process

This document describes how advisors can book a free 30-min consultation with ClearEstate for their clients

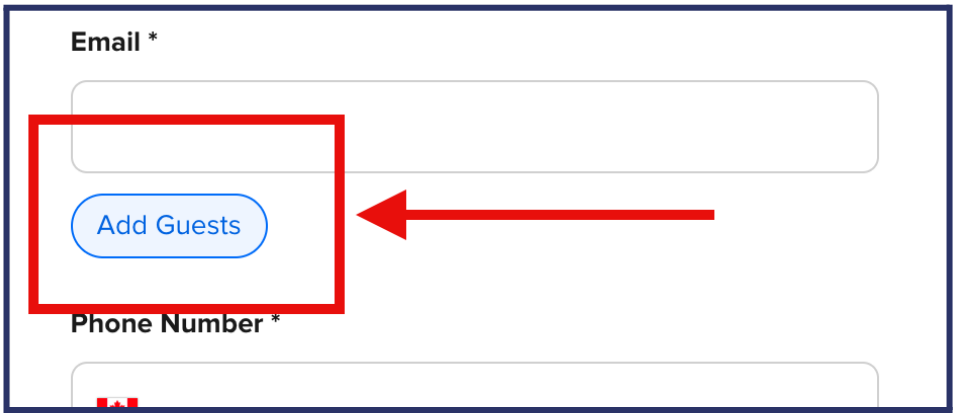
1) Go to this page: clearestate.com/partners/echelon-advisor-help-centre
2) Go to the date selector, choose a date/time convenient for the client and click on **"Confirm"**



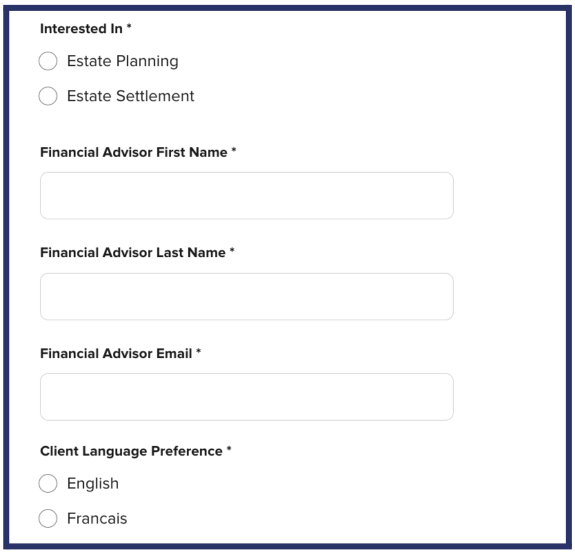
3) Fill out the **CLIENT'S** contact information in the first fields for First Name, Last Name, Email, and Phone Number.



4) If you have your client's permission to join the meeting, add yourself as an attendee by clicking on the "**Add Guests**" button and *then* entering your email in the "**Guest Email(s)**" box when it appears.



5) Fill out the rest of the required information about yourself and the client such as your contact information, the client's interest, their approximate estate value, etc.



6) Click on "**Schedule Event**" to complete the booking and you're done!