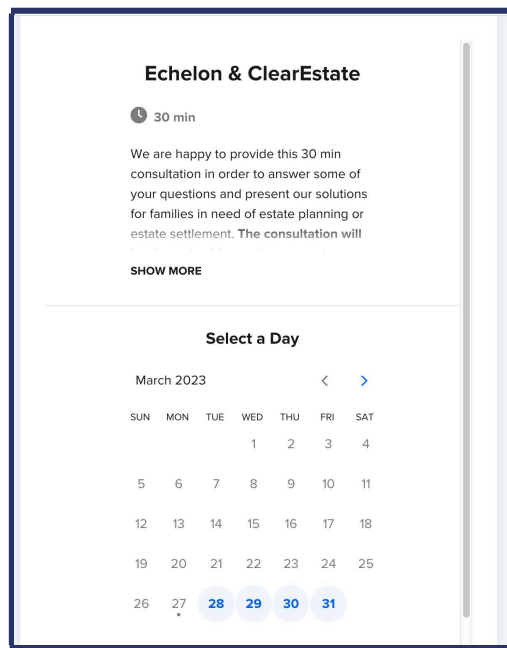


## Step by Step Consultation Booking Process

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](https://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"**



**Echelon & ClearEstate**

🕒 30 min

We are happy to provide this 30 min consultation in order to answer some of your questions and present our solutions for families in need of estate planning or estate settlement. The consultation will

**SHOW MORE**

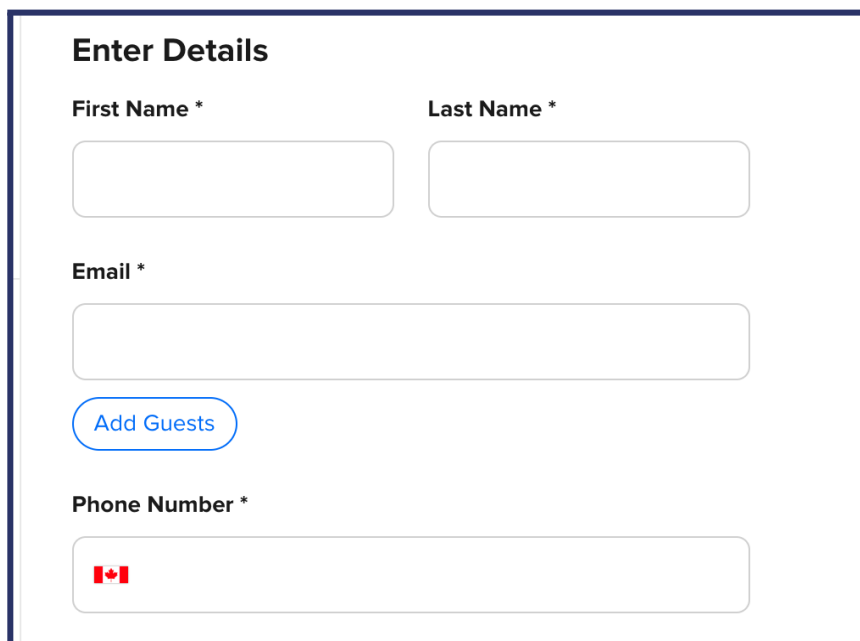
---

**Select a Day**

March 2023 < >

SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

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



**Enter Details**

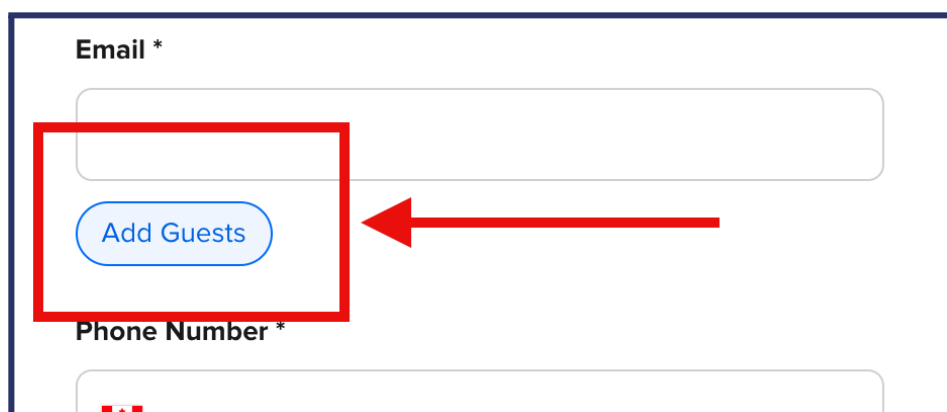
**First Name \*** **Last Name \***

**Email \***

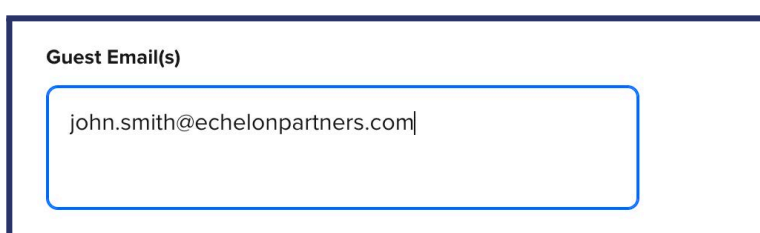
[Add Guests](#)

**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.

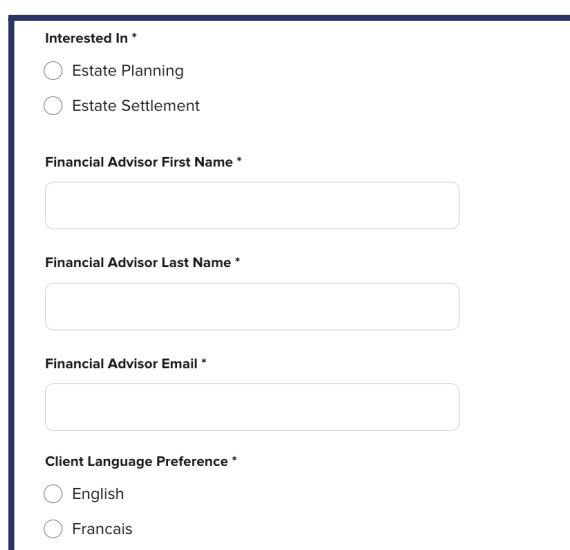


This screenshot shows a form section with two input fields. The first field is labeled "Email \*" and is empty. Below it is a blue button labeled "Add Guests". A red rectangle highlights the "Add Guests" button, and a red arrow points to it from the right. Below the button is a field labeled "Phone Number \*" which is partially visible.



This screenshot shows a form section with a single input field labeled "Guest Email(s)". The field contains the email address "john.smith@echelonpartners.com".

- 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.



This screenshot shows a form section with several input fields and radio buttons. The first section is labeled "Interested In \*" and has two radio buttons: "Estate Planning" and "Estate Settlement". Below this are three input fields labeled "Financial Advisor First Name \*", "Financial Advisor Last Name \*", and "Financial Advisor Email \*". At the bottom is a section labeled "Client Language Preference \*" with two radio buttons: "English" and "Francais".

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

**Schedule Event**