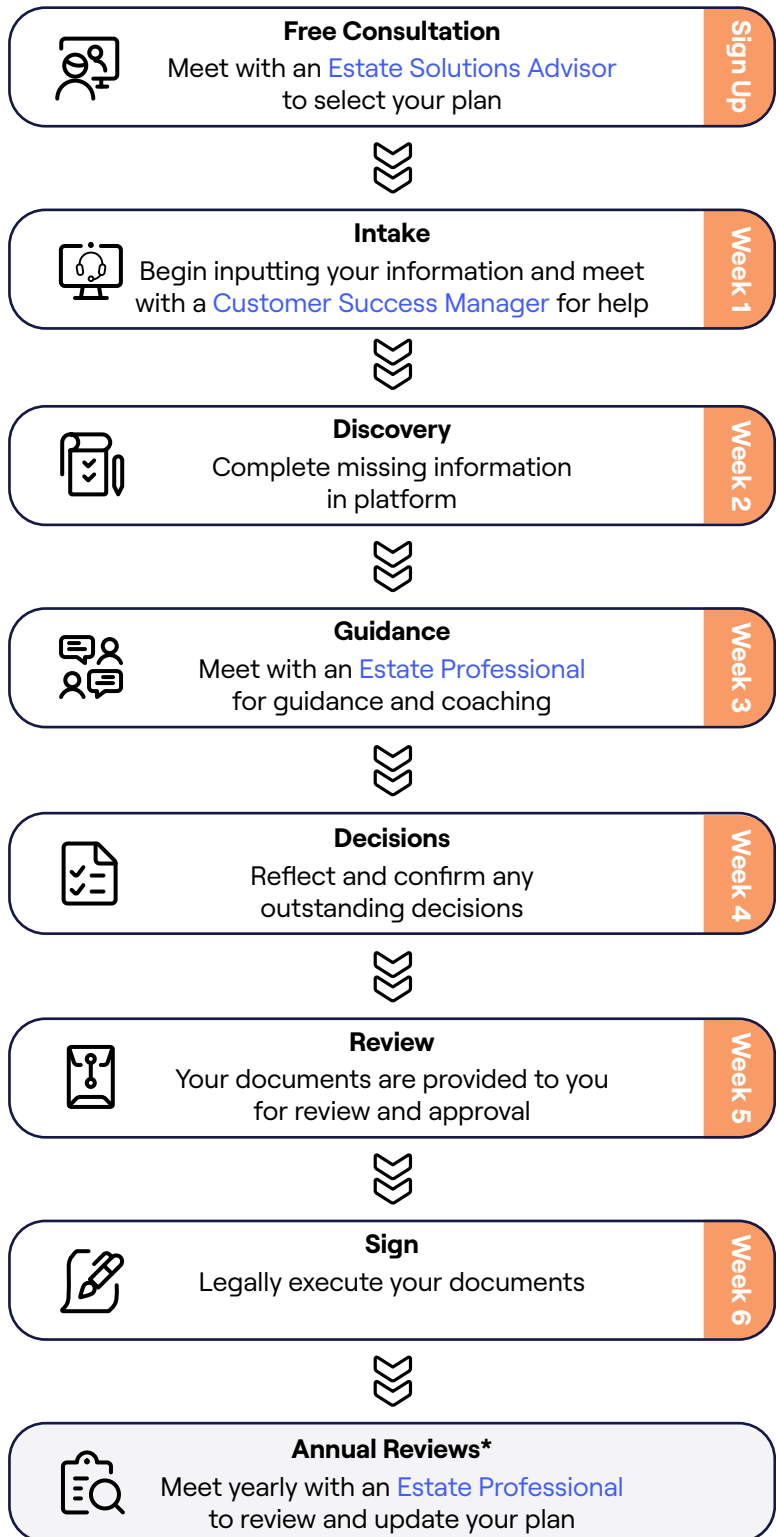


Your Estate Planning Journey

Planning your estate with ClearEstate will safeguard your wealth, minimize taxes, and ease the burden on loved ones when the time comes. Here's how it works:



Timeline is approximate and dependent on you completing steps in the ClearEstate platform.

It may take longer if customized drafting by an independent attorney is required.

**Annual reviews are included in Complete and Professional estate plans.*

Your Estate Planning Team

Our team will provide transparent, one-on-one support to help you build a holistic estate plan in our modern, user-friendly online platform.



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
- View an interactive, visual estate distribution plan
- Chat with dedicated Estate Professionals