

# The only resource you need to plan your estate.

## Why plan your estate with ClearEstate?

- Fully online service saves you time and makes it easy to work with your advisor.
- Estate planning & administration is all we do at ClearEstate.
- Provision of Wills, Trusts, Powers of Attorney, Mandates and Personal Representative Agreements.
- Online access and support for your future executor.



## Why choose a professional executor or trustee?

- An executor’s job often lasts for 1-2 years. The commitment of a trustee can last 1-2 decades.
- Ensure unbiased, trained professionals are handling your estate.
- Relieve the burden from family members and protect relationships that can be broken during estate settlement.
- Save your family thousands of dollars in the future.

## How does this save me money?

The following is a cost comparison of settling an estate with a personally appointed Executor, a Bank Trust as Executor, or with ClearEstate.\*

	Individual (5%)	Bank Trust (4%)	ClearEstate (1%)
Settlement fee	\$50K	\$40K	\$10K
Lawyer’s fees (probate filing)	\$6K (\$300/hr x 20 hrs)	\$5K (\$250/hr x 20 hrs)	Included
Accounting fees (tax filings)	\$2,000	\$2,000	Included
Appraisals & other disbursements (est. 1%)	\$10K	\$10K	\$10K
Total cost to the estate	\$68K	\$57K	\$20K
Net estate value	\$932K	\$943K	\$980K

\*Based on \$1M Estate



**Estate Planning Services** start at \$595 for individuals and \$795 for couples.

**Professional Plans** (including access to professional executor services) for individuals from \$3,995 and for couples from \$4,595.

Additional fees apply for secondary wills, multiple jurisdictions, corporate/business planning, and trusts.

# Prepare today for peace of mind tomorrow

Planning your estate with ClearEstate is easy as 1... 2 ... 3!

## Intake

Aggregation of all information related to assets, family members, and other parties involved in your estate.

### Why?

To provide thoughtful and comprehensive guidance, it is important for us to have a thorough understanding of both who and what we are planning for.

# 1

## Guidance

A time to discuss your wishes and unique needs for a personalized estate plan. e.g. Do you require a secondary will or a spousal trust?

### Why?

Family dynamics, minor beneficiaries, business considerations, charitable contributions, assets or people in other provinces - there is a lot to consider to ensure your estate is properly planned.

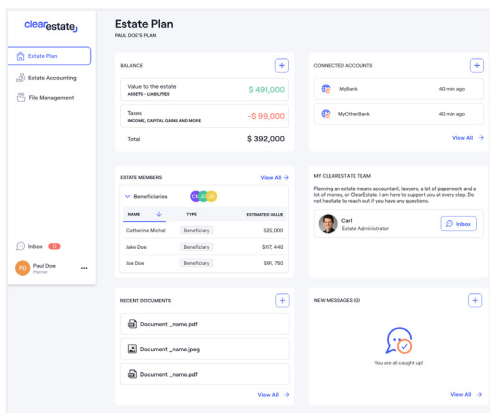
# 2

# 3

## Review

Based on the outcomes of your guidance meeting, we'll review your estate plan and documents together to ensure you understand everything that will happen, and that it is in line with your wishes. We'll then guide you through how to execute your planning documents, ensuring your comprehensive estate plan is in place.

ClearEstate's transformative approach to estate planning ensures that you're prepared today to offer lasting peace of mind for tomorrow. Planning your estate with ClearEstate will safeguard your wealth, minimize taxes, and ease the burden on loved ones when the time comes.



## Estate planning online tool

Shows all information tied to the planning of the estate, the eventual distribution plan and even a family tree, all displayed in an easy to use dashboard.

## Clear distribution tree

Allows you to easily see exactly what will happen with your estate upon your passing.

