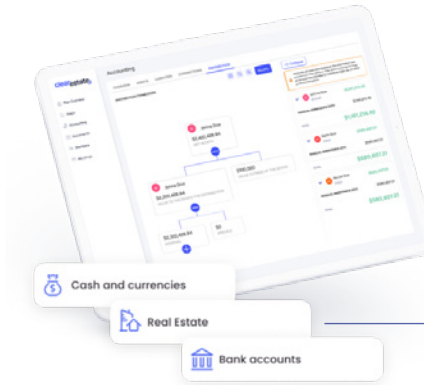


Estate Planning Services

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.

Our team of Estate Professionals will provide transparent, one-on-one support to help you build a holistic estate plan. Our specialists will outline planning strategies to maximize what you leave behind and ensure an efficient



transfer of your assets to your beneficiaries. We'll guide you to make informed decisions about executorship, guardianship, distribution and more, with your goals and your beneficiaries' best interests in mind.

Your expertly crafted estate plan is securely stored in a modern, user-friendly online platform. All information tied to the planning of the estate, the eventual distribution plan and even a family tree is displayed in an easy-to-use dashboard.



	Complete	Most Selected Professional
Retail price ¹ : Individual/Couple	\$1,995 / \$2,995	\$3,995 / \$4,595
Annual fee ²	+\$99 yr	+\$129 yr
ClearEstate online platform: estate planning dashboard, connect & track financial accounts, net worth tracker, document builder, document storage	✓	✓
*Notarial will	✓	✓
*Protection mandate	✓	✓
Information access for your liquidator when you pass away	✓	✓
Assistance from our Customer Support Team	✓	✓
Professional guidance from our Estate Professionals	✓	✓
Distribution tree - visualize your distribution plan	✓	✓
Estate plan optimization with multidisciplinary experts - review of goals, impact of probate, tax considerations, family dynamics, etc.	✓	✓
Estate Plan Report - review a summary of your plan	✓	✓
Add-on services available based on your needs and circumstances	+\$	+\$
*Professional liquidator appointed in your future estate settlement		1% of FMV*** at settlement
*Professional POA for property appointed in case of incapacity (optional)		1% of FMV*** if activated

¹All prices are subject to change without notice and are not guaranteed, unless the selected plan has already been paid.

*In Quebec, the drafting of notarial wills and protection mandates is provided by ClearEstate's independent notary partner.

**Professional plan requires your appointment of Natcan Trust Company, a wholly-owned subsidiary of National Bank of Canada, as your liquidator, with ClearEstate as agent.

***FMV = gross fair market value of assets under administration.

²About our annual fees

The estate plan annual fee provides ongoing 24/7 access to the ClearEstate online platform. Here, you can store your documents, connect your financial accounts, build your inventory of assets and liabilities, track your net worth, and view your interactive, visual estate distribution plan.

