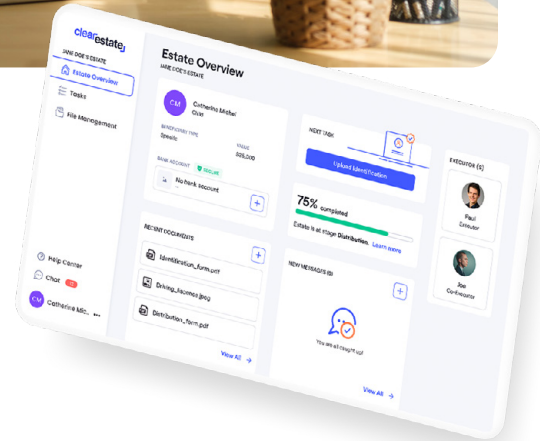


# Estate Settlement Services



In times of grief, navigating estate settlement can be emotionally draining. We'll help you navigate estate settlement with convenience and confidence in our easy-to-use online platform and with the help of our specialized team.

Settling estates is our priority, and we will be with you every step of the way: We can guide you from filing the right paperwork to taking care of taxes and closing the estate.



## 3 plans to suit estates of all sizes and complexities:

### Settlement

For liquidators seeking a streamlined process and expert support to settle an estate.

### Settlement & Taxes

For liquidators seeking a streamlined process and expert support to settle an estate, including filing taxes.

### Professional Representative\*

For families seeking a professional liquidator to be responsible for the estate settlement, with ClearEstate handling the administrative burden, providing total peace of mind.

Continue to the next page for pricing details. >>

	Settlement	Settlement & Taxes	Professional Representative*
Price starting at†:	\$4,198	\$8,898	1.75%‡ Minimum \$20,000
IG client discount	10% off	10% off	
Price for IG clients (starting at)	\$3,778	\$8,008	10% OFF of first \$20k
ClearEstate online platform Liquidator portal, online chat for liquidators, and Beneficiary portal	✓	✓	✓
Professional guidance	✓	✓	✓
Initial Death Notifications	✓	✓	✓
Will Search	✓	✓	✓
Declaration of Heredity	✓	✓	✓
Designation of Liquidator	✓	✓	✓
Impartial Professional acts as Estate Representative <i>Conditions apply.</i>	✗	✗	✓
Discovery of Assets & Liabilities <i>Obtaining information about date of death value of assets and liabilities</i>	Support provided	Support provided	Done for you
Data Entry <i>Entering personal and financial information in platform</i>	CE guides; you input data and validate	CE guides and inputs the data; you validate	Data is input and validated for you
Generate and Register Inventory & Closure of Inventory <i>A detailed list of all assets and liabilities of the estate is created and the notice is registered with the RDPRM</i>	CE preps & sends, you confirm	CE preps & sends, you confirm	Validated and executed for you
Communication with financial institutions <i>Banks, credit unions, asset managers, brokerages</i>	up to 20 hrs	up to 25 hrs	Unlimited
Communication with other 3rd parties <i>Government agencies, courthouses, utility providers</i>	up to 10 hrs	up to 15 hrs	Unlimited
Communication with beneficiaries	✗	✗	✓
Liquidation & Distribution <i>Assets are sold or transferred, debts settled, estate is distributed as per the will (or legislation if no will)</i>	CE prepares instructions; you send & confirm	CE prepares & sends instructions; you confirm	Validated and executed for you
Final Account & Release from Liability <i>Generate and register liquidator's final account of administration and release from liability</i>	CE prepares; you send & confirm	CE prepares & sends; you confirm	Validated and executed for you
Estate Transaction Report <i>Available where online access is permitted by the financial institution</i>	✗	✓	✓
Preparation of Terminal T1 <i>Final individual year of death return</i>	✗	✓	✓
Preparation of First Estate T3 <i>First estate tax return</i>	✗	✓	✓
Preparation of Clearance Certificate Application <i>Confirms tax liabilities are settled to the satisfaction of Canada Revenue Agency and Revenu Quebec.</i>	✗	✓	✓

Settlement plan fees do not include the cost of notarization of signatures or documents, notice to creditors, estate administration tax, costs to transfer real title, services rendered to other professionals, such as appraisers, property managers, etc., or other estate expenses unless otherwise specified.

Some estates are more complicated to settle, such as where there are multiple liquidators, business interests, rental properties, trusts, multi-jurisdictions, non-notarial wills such as holograph or witnessed wills, or where legislation requires a Quebec notary or attorney or legal or tax advice or additional documents are needed. In such cases, add-ons may apply and/or it may be necessary to engage external professionals at an additional cost to the estate.

\*Professional Representative plan is provided in partnership with ClearEstate's trust partner and is subject to partner and court approval. Estates must be solvent and free from claims in order to qualify. For more information, visit [clearestate.com](https://clearestate.com) to see our privacy policy and terms of use.

†All plans have a processing fee of \$155 (not included in prices shown above) which includes will search fees, registration of Notice of Closing of Inventory and Notice of Closing of Estate with Quebec government (RDPRM) and up to 4 title searches. Does not include newspaper publication, or any services where a notary is required.

‡ClearEstate's fee: 1.75% of fair market value of the estate assets as of date of death, subject to a minimum fee of \$20,000.