ClearEstate Platform Feature: Teams Structure

Empower your practice with seamless collaboration

At ClearEstate, we're constantly listening to your feedback and building with your success in mind. That's why we're excited to introduce the new Teams Structure, a powerful new feature that enables associates, advisors, and administrators within your practice to collaborate in one secure, centralized workspace.

Whether you're referring clients, sharing documents, or overseeing case progress, the platform's Teams Structure feature makes it easier than ever for your practice to work together securely, efficiently, and with confidence.

Shared Client Access

When any team member invites a client, everyone on the team can access that client's profile and vault, keeping communication aligned and support consistent.

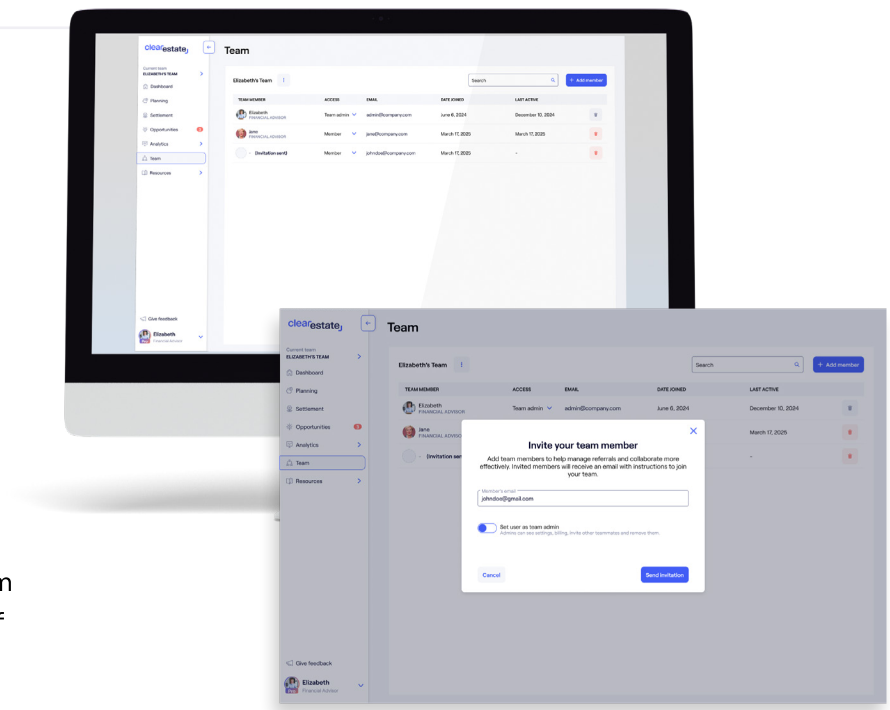
Centralized Referral Management

Track and manage referrals in one place, ensuring every opportunity is captured and acted on. Nothing gets missed, and everything stays organized.

Designed for Growth

Build a collaborative practice that scales. The platform's Teams Structure feature enables you to invite new team members, align roles, and work in sync, so you can serve more clients, more effectively.

Getting started



Create a Team

1. Log in to the ClearEstate Advisor Platform: app.clearestate.com/sso-login
2. Click the Team tab in the left menu
3. Select Create Team and follow the prompts

We recommend that the **lead advisor** create the team to retain full control over team structure and permissions. Assistants may use the lead advisor's information to create a team on their behalf.

How to Join a Team

If you're invited, you'll receive an email from a Team Admin. Simply click the link and log in, or sign up if you're new to ClearEstate.

Questions? Contact IGquestions@clearestate.com

FAQs: ClearEstate Teams Structure

Why should I create a team?
Creating a team allows all members to share access to client accounts. If one team member invites a client, others within the same team will automatically have visibility and access to that client's vault and details, fostering seamless collaboration.

Who should create the team?
Teams should be created by the lead advisor or principal of your practice to ensure centralized oversight of team settings, roles, and membership.

Assistants may use the lead advisor's information to create a team on their behalf.

Important: The lead advisor should always hold the Admin role within the team structure.

Can I invite someone who's not already registered with ClearEstate?
Yes. You can invite both new users and existing ClearEstate users.

What happens to my existing referrals when I create or join a team?
Your referrals will automatically transfer to the first team you join, ensuring all leads are carried over to the shared workspace.

Can I create or join multiple teams?
Yes. You're welcome to create or be part of multiple teams if it fits your workflow.

Why is there a team called "(Your name) personal"?
This is your private referral space. It's visible only to you and can be used for referrals you wish to keep separate from your team.

What if I referred myself for ClearEstate services and don't want my team to access my vault?
You can log into your vault and revoke data-sharing consent at any time. Your name will still appear in the referral list, but your vault will remain private.

What's the difference between Members and Admins?
Members have full access to client files. Admins have all Member permissions, plus the ability to manage team membership and settings (rename or delete the team). It is best practice for lead advisors to hold the Admin role within the team structure.

What happens if I delete a team?
You'll be prompted to reassign any referrals tied to the team either back to yourself or to their original referrers before deletion is finalized.

What if I delete someone from my team?
Their referrals will be retained by the team, ensuring no disruption to ongoing client work.

What if I have more questions?
Your ClearEstate Partner Relations Manager is here to help. Reach out anytime for assistance or guidance.

Get started : Create your team now

Log in to the ClearEstate Advisor Platform:
app.clearestate.com/sso-login