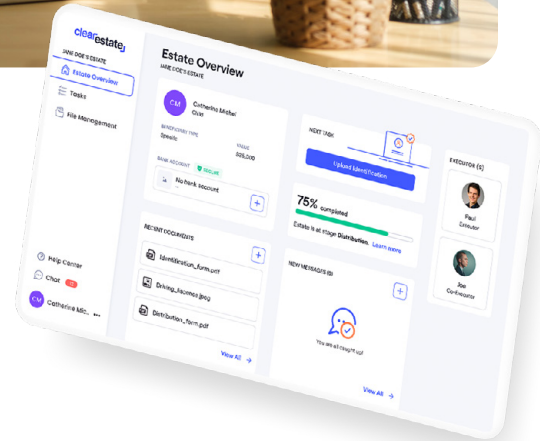


Estate Settlement Services



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 applying for probate and filing the right paperwork to taking care of taxes and closing the estate.



3 plans to suit estates of all sizes and complexities:

Probate

For executors seeking a streamlined process and expert support to apply for probate and settle an estate.

Probate & Taxes

For executors seeking a streamlined process and expert support to apply for probate and settle an estate, including filing taxes.

Professional Representative*

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

Included: Online will & POA for executors and beneficiaries

Continue to the next page for pricing details. >>

	Probate	Probate & Taxes	Professional Representative*
Price starting at†:	\$4,948	\$9,648	1.75%‡ Minimum \$20,000
IG client discount	10% off	10% off	
Price for IG clients (starting at)	\$4,453	\$8,683	10% OFF of first \$20k
ClearEstate online platform: Executor portal, online chat for executors, and Beneficiary portal	✓	✓	✓
Professional guidance	✓	✓	✓
Initial Death Notifications <i>Government and credit agencies, etc.</i>	✓	✓	✓
Probate Application <i>Judicial process where the representative of the estate and the will, if there is one, is validated (one jurisdiction included)</i>	✓	✓	✓
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>	ClearEstate provides guidance; you input data and validate	ClearEstate provides guidance and inputs the data; you validate	Data is input and validated for you
Communication with financial institutions <i>Banks, credit unions, asset managers, brokerages</i>	up to 20h	up to 25h	Unlimited
Communication with other 3rd parties <i>Government agencies, courthouses, utility providers</i>	up to 10h	up to 15h	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) and releases are obtained from beneficiaries.</i>	ClearEstate prepares instructions; you send & confirm	ClearEstate prepares & sends instructions; 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 Canada Revenue Agency's satisfaction.</i>	✗	✓	✓
BONUS OFFER			
Online will & POA documents <i>Create your will and power of attorney documents online. Available for executors and beneficiaries of the estate in Canada. Not transferable.</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 executors, business interests, trusts, multi-jurisdictions, or where legislation requires an attorney or there is legal or tax advice or additional documents 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 to see our privacy policy and terms of use.

†Add \$650 for intestate estates (estate with no valid will).

‡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.