

Traditional Route:

- Lawyers that require a considerable retainer or often charge hourly
- Primary focus is on court filing
- Estate settlement usually not main expertise
- Technology is underutilized
- No assistance with tax filing
- Minimal transparency for beneficiaries
- Support usually limited to one jurisdiction
- Requires driving and in-person meetings
- Limited support for dealing with third parties

Our Route:

- No retainer or hourly rate. Payment plans available
- Simple and accessible plans based on complexity and level of support desired
- Supports all steps of estate planning
- Dedicated Estate Professionals specializing exclusively on estate planning & settlement
- Tech-enabled platform and record keeping
- Supports preparation of tax filings
- Enables transparency with beneficiary portal
- Virtual meetings at your convenience



Essential Plan \$2748

For executors or estate representatives seeking support settling their estate.

- Dedicated estate professional
- Probate application, filing and review
- Estate overview dashboard
- Inventory of assets and liabilities
- Two document notarizations
- Dedicated online chat



Plus Plan \$3948

For executors or estate representatives seeking support settling their estate.

Same as Essential Plan plus:

- Beneficiary portal
- Final Tax report, Estate Tax Report, and Clearance Certificate



Complete Plan \$5148

For executors or estate representatives seeking full support settling their estate.

Same as Plus Plan plus:

- 3 extra notarizations
- Automated asset discovery
- 10 hours representation with 3rd parties
- Date entry & asset liquidation
- Estate accounting reports
- 20 hours representation with financial institutions



Premium Plan \$7188

For executors or estate representatives who want total peace of mind.

Same as Complete Plan plus:

- 1 more jurisdiction
- 5 extra notarizations
- 30 more hours representation with financial institutions
- 15 more hours representation with 3rd parties

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Prices are for individuals; couple pricing also available.



iA Private Wealth is a trademark and business name under which iA Private Wealth Inc. operates. iA Private Wealth Inc. is a member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada. Greenfeld Financial Management is a personal trade name of Jeffrey Greenfeld. Additional charge for intestate scenarios.

Estate Settlement Process with ClearEstate

It takes **up to 18 months** to settle an estate, with average legal and accounting fees of \$12,400 (based on average estate size of \$200,000)

ClearEstate clients reduce that process by **up to 6 months**.

