

Traditional Route:

- Usually hourly, or will add unexpected fees
 - Typically solo or very small team
 - Estate planning is usually not main area of practice
 - Technology is underutilized
 - Often requires driving and inflexible in-person meetings
 - Limited to certain parts of the planning process.
- Does not do the detailed inventory of assets for example

Our Route:

- No hourly rate, simple and accessible packages based on complexity and level of support desired
- Dedicated Estate Professional and team of subject matter experts to give you the best service possible
- Specializes exclusively in estate planning
- Guided online service with step-by-step estate planning platform and record keeping
- Offer virtual meetings delivered on your schedule
- End-to-end estate planning: detailed inventory of assets, distribution framework, connected accounts

**Essential Plan** \$588

If you have a will and a simple estate.

Consolidate your documents

- Online estate planning tool and secure digital vault
- Online Access and Live support for your Executor or Power of Attorney
- Annual review of info & docs

**Plus Plan** \$1188

If you have a simple estate and you are looking to get your affairs in order.

Same as Essential Plan plus:

- Guidance on executor appointment
- Will and POA preparation & storage
- Affidavit of execution of will
- Digital Distribution & Liquidation Plan
- Online family tree

**Complete Plan** \$1788

If you have a complex estate.

Same as Plus Plan plus:

- Additional support for businesses
- Support for complex family dynamics
- Strategies for complex distribution plans

**Professional Executor Plan** \$3948

If you require a professional executor for your estate.

Same as Complete Plan plus:

- Dedicated estate professional
- Will, POA, Health Directive prepared and stored
- Affidavit of execution of will
- Personalized strategies for complex estates
- Online planning tool and dashboard
- Review of info & documents

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*Note: not a complete list of benefits of features

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**Essential Plan** \$948

If you have a will and a simple estate.

Consolidate your documents

- Online estate planning tool and secure digital vault
- Online Access and Live support for your Executor or Power of Attorney
- Annual review of info & docs

**Plus Plan** \$2028

If you have a simple estate and you are looking to get your affairs in order.

Same as Essential Plan plus:

- Guidance on executor appointment
- Will and POA preparation & storage
- Affidavit of execution of will
- Digital Distribution & Liquidation Plan
- Online family tree

**Complete Plan** \$2988

If you have a complex estate.

Same as Plus Plan plus:

- Additional support for businesses
- Support for complex family dynamics
- Strategies for complex distribution plans

**Professional Executor Plan** \$4548

If you require a professional executor for your estate.

Same as Complete Plan plus:

- Dedicated estate professional
- Will, POA, Health Directive prepared and stored
- Affidavit of execution of will
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Estate Planning Process with ClearEstate

With ClearVault, you can ensure **significantly quicker and easier** settlement of your estate.

Interview with your **dedicated estate professional** to go through your goals

Personalized estate plan with clear and visual distribution plan

All important documents are securely stored in **ClearVault**, eliminating the need to go hunting for records

Inventory and appraisal of all assets

ClearEstate helps you prepare and file **all necessary documents** (e.g. wills & codicils, power of attorney, trusts, health care directives, etc.)

Unlimited updates to your estate plan, including an annual review with suggested changes and improvements

You will receive **guidance and coaching** from estate professionals every step of the way.