clearestate, Estate Planning Pricing-Individuals clearestate,

 Traditional Route: Usually hourly, or will add unexpected fees Typically solo or very small team Estate planning is usually not main area of p Technology is underutilized Often requires driving and inflexible in-persone meetings Limited to certain parts of the planning procoder boos not do the detailed inventory of assets example 	 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
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\$3948If 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
Jeff Greenfeld, Investment Advisor, iA Private W	

4877 Delta Street, Delta, BC V4K 2T9 | 604.940.8617 Jeff@greenfeldfinancial.com greenfeldfinancial.com/estate-planning GREENFELD Financial Management Your Future ... Our Focus



*Note: not a complete list of benefits of features



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Estate Planning Pricing - Couples clearestate clearestate_j

Traditional Route:	Our Route:
 Usually hourly, or will add unexpected fees Typically solo or very small team Estate planning is usually not main area of praction 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 	 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
	onsolidate your documents Opling estate planning tool and secure digital yoult
	Online estate planning tool and secure digital vault Online Access and Live support for your Executor or Power
If you have a will and a simple estate.	of Attorney Annual review of info & docs
Plus Plan\$2028If you have a simple estate and you are looking to get your affairs in order.	ame 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 \$2000	ame as Plus Plan plus:
	Additional support for businesses Support for complex family dynamics
If you have a complex estate.	Strategies for complex distribution plans
Froressional Executor Plan If you require a professional executor for	ame 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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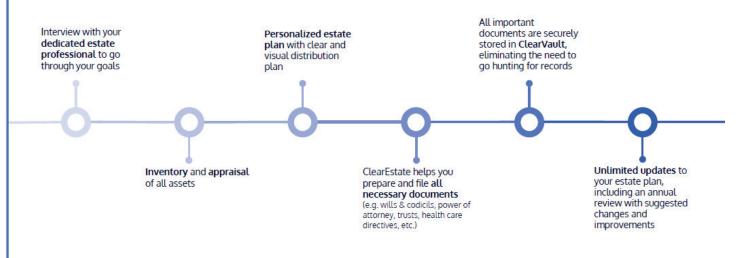
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Estate Planning Process with ClearEstate

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



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