## clearestate, Estate Planning Pricing-Individuals clearestate,

<ul> <li>Traditional Route:</li> <li>Usually hourly, or will add unexpected fees</li> <li>Typically solo or very small team</li> <li>Estate planning is usually not main area of p</li> <li>Technology is underutilized</li> <li>Often requires driving and inflexible in-persone meetings</li> <li>Limited to certain parts of the planning procoder boos not do the detailed inventory of assets example</li> </ul>	<ul> <li>matter experts to give you the best service possible</li> <li>Specializes exclusively in estate planning</li> <li>Guided online service with step-by-step estate</li> <li>planning platform and record keeping</li> </ul>
<b>Essential Plan</b> \$588 If you have a will and a simple estate.	<ul> <li>Consolidate your documents</li> <li>Online estate planning tool and secure digital vault</li> <li>Online Access and Live support for your Executor or Power of Attorney</li> <li>Annual review of info &amp; docs</li> </ul>
<b>Plus Plan</b> \$1188 If you have a simple estate and you are looking to get your affairs in order.	<ul> <li>Same as Essential Plan plus:</li> <li>Guidance on executor appointment</li> <li>Will and POA preparation &amp; storage</li> <li>Affidavit of execution of will</li> <li>Digital Distribution &amp; Liquidation Plan</li> <li>Online family tree</li> </ul>
<b>Complete Plan</b> \$1788 If you have a complex estate.	<ul> <li>Same as Plus Plan plus:</li> <li>Additional support for businesses</li> <li>Support for complex family dynamics</li> <li>Strategies for complex distribution plans</li> </ul>
Professional Executor Plan\$3948If you require a professional executor for your estate.	<ul> <li>Same as Complete Plan plus:</li> <li>Dedicated estate professional</li> <li>Will, POA, Health Directive prepared and stored</li> <li>Affidavit of execution of will</li> <li>Personalized strategies for complex estates</li> <li>Online planning tool and dashboard</li> <li>Review of info &amp; documents</li> </ul>
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<sub>j</sub>

Traditional Route:	Our Route:
<ul> <li>Usually hourly, or will add unexpected fees</li> <li>Typically solo or very small team</li> <li>Estate planning is usually not main area of praction</li> <li>Technology is underutilized</li> <li>Often requires driving and inflexible in-person meetings</li> <li>Limited to certain parts of the planning process. Does not do the detailed inventory of assets for example</li> </ul>	<ul> <li>No hourly rate, simple and accessible packages based on complexity and level of support desired</li> <li>Dedicated Estate Professional and team of subject matter experts to give you the best service possible</li> <li>Specializes exclusively in estate planning</li> <li>Guided online service with step-by-step estate planning platform and record keeping</li> <li>Offer virtual meetings delivered on your schedule</li> <li>End-to-end estate planning: detailed inventory of assets, distribution framework, connected accounts</li> </ul>
	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:
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Jeff Greenfeld, Investment Advisor, iA Private Wealth 4877 Delta Street, Delta, BC V4K 2T9   604.940.8617 Jeff@greenfeldfinancial.com	

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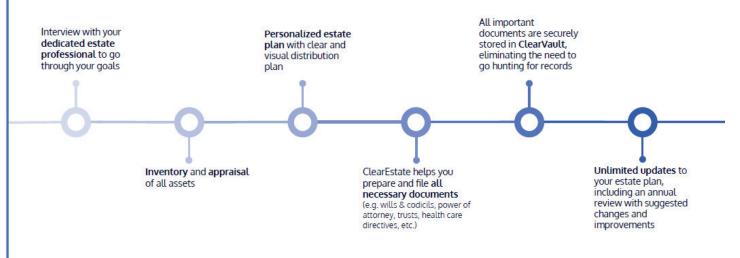
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## Estate Planning Process with ClearEstate

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.