

## 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

**Professional Plan**

1 %of fair market value of estate assets.

- 2 jurisdiction and 10 notarizations
- CE acts as agent to professionally manage the settlement
- Communication with beneficiaries
- CE inventories & discovers assets/liabilities
- Asset liquidation
- Tax Filings

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\*Note: not a complete list of benefits or features

*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**.

