Estate Planning Pricing- Individuals

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

Estate Planning Pricing - Couples

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:

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- Dedicated Estate Professional and team of subject matter experts to give you the best service possible
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- Offer virtual meetings delivered on your schedule
- End-to-end estate planning: detailed inventory of assets, distribution framework, connected accounts

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
- Personalized strategies for complex estates
- Online planning tool and dashboard
- Review of info & documents

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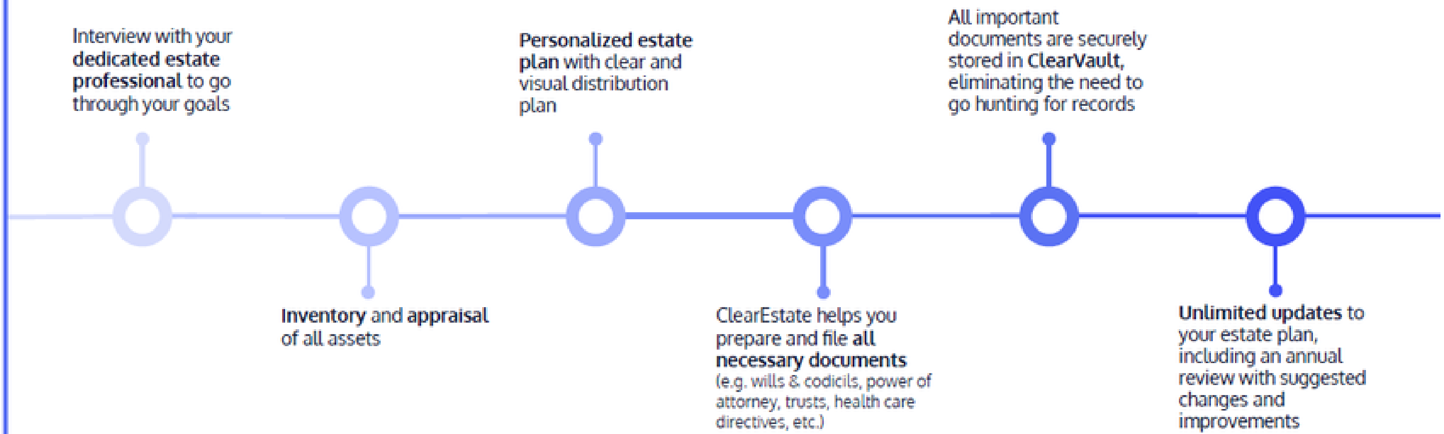
Estate Planning Process with ClearEstate

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.