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

Online Will $249

Best for those needing to create your last will and testament.

- ClearEstate online platform: estate planning dashboard, connect & track financial accounts, net worth tracker, document builder, document storage
- Create your last Will and Testament
- Create your POAs for property and personal care
- 24/7 online platform access

Basic $595

If you have a will and a simple estate.

Same as Online Will plus:

- Distribution tree: visualize your distribution plan
- Assistance from our Customer Support Team
- No add-on services available

Complete $1995

Best for those looking for comprehensive guidance or have more complex estate dynamics.

Same as Basic plus:

- Professional guidance from our Estate Professionals
- Meetings to review your goals and consider the impact of probate, tax implications and family dynamics
- Online chat support
- Estate Plan Report
- Add-on services available

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iA Private Wealth

*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
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Basic $795 If you have a will and a simple estate.	Same as Online Will plus: • Distribution tree: visualize your distribution plan • Assistance from our Customer Support Team • No add-on services available
Complete $2995 Best for those looking for comprehensive guidance or have more complex estate dynamics.	Same as Basic plus: • Professional guidance from our Estate Professionals • Meetings to review your goals and consider the impact of probate, tax implications and family dynamics • Online chat support • Estate Plan Report • Add-on services available

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Your Estate Planning Journey

Planning your estate with ClearEstate will safeguard your wealth, minimize taxes, and ease the burden on loved ones when the time comes. Here's how it works:

Free Consultation — *Sign Up*
Meet with an Estate Solutions Advisor to select your plan

Intake — *Week 1*
Begin inputting your information and meet with a Customer Success Manager for help

Discovery — *Week 2*
Complete missing information in platform

Guidance — *Week 3*
Meet with an Estate Professional for guidance and coaching

Decisions — *Week 4*
Reflect and confirm any outstanding decisions

Review — *Week 5*
Your documents are provided to you for review and approval

Sign — *Week 6*
Legally execute your documents

Annual Reviews*
Meet yearly with an Estate Professional to review and update your plan

Timeline is approximate and dependent on you completing steps in the ClearEstate platform.
It may take longer if customized drafting by an independent attorney is required.
**Annual reviews are included in Complete and Professional estate plans.*

Book a free consultation: Visit clearestate.com/iAPW or speak to your advisor about contacting ClearEstate