## clearestate, Estate Planning Pricing- Individuals clearestate,

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 practice</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> <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>	
Online Will \$249 Best for those needing to create your last will and testament.	<ul> <li>ClearEstate online platform: estate planning dashboard, connect &amp; track financial accounts, net worth tracker, document builder, document storage</li> <li>Create your last Will and Testament</li> <li>Create your POAs for property and personal care</li> <li>24/7 online platform access</li> </ul>
<b>Basic</b> \$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.	<ul> <li>Same as Basic plus:</li> <li>Professional guidance from our Estate Professionals</li> <li>Meetings to review your goals and consider the impact of probate, tax implications and family dynamics</li> <li>Online chat support</li> <li>Estate Plan Report</li> <li>Add-on services available</li> </ul>

Jeff Greenfeld, Investment Advisor, iA Private Wealth 4877 Delta Street, Delta, BC V4K 2T9 | 604.940.8617 Jeff@greenfeldfinancial.com greenfeldfinancial.com/estate-planning \*Note: not a complete list



\*Note: not a complete list of benefits of 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 Planning Pricing- Couples clearestate<sub>j</sub>

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

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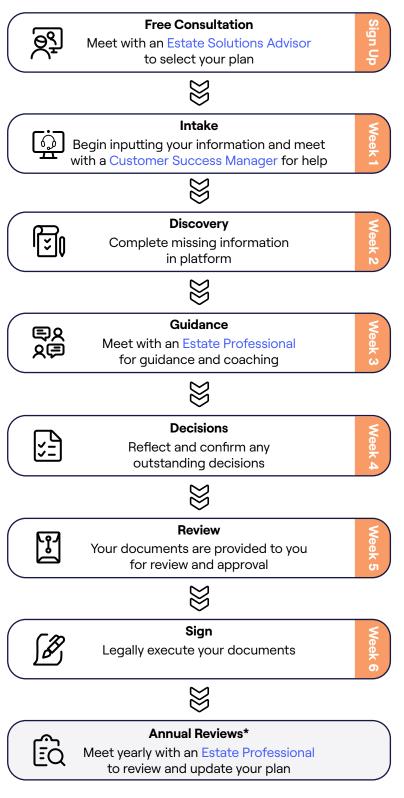
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# **clear**estate

# 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:





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.