clearestate, Estate Planning Pricing- Individuals clearestate,

Traditional Route:	Our 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 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

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

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Estate Planning Pricing- Couples clearestate_j

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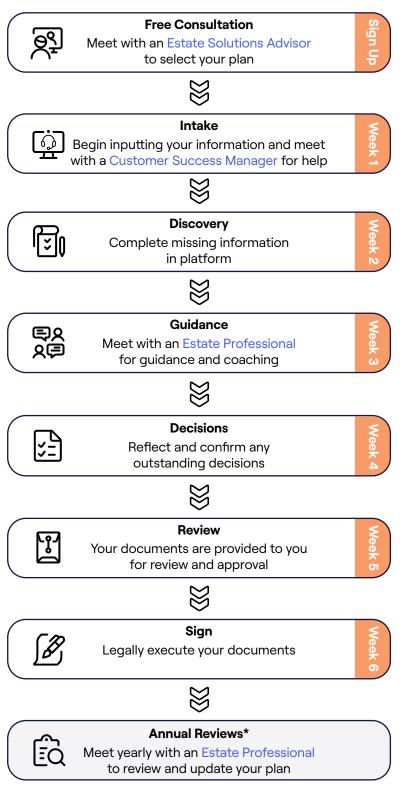
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Your Estate Planning Journey

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:





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.