

## 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



### Probate \$5548

For executors seeking a streamlined process and expert support to apply for probate and settle an estate.

- Online Platform
- Initial Death Notifications
- Probate application prepared from information provided
- Guided discovery of assets & liabilities
- Up to 20 hrs of communications with financial institutions
- Up to 10 hrs of communications with other 3rd parties
- ClearEstate prepares liquidation & distribution instructions



### Probate & Taxes \$10,248

For executors seeking a streamlined process and expert support to apply for probate and settle an estate, including filing taxes.

Same as Probate plus:

- Tax preparation of Final T1 Return/First Estate T3 Return
- Tax Clearance Certificate application
- Data entry of personal & financial information
- Additional 5 hrs of communications with financial institutions & 5 hrs with other 3rd parties
- ClearEstate sends your liquidation & distribution instructions
- Estate transaction report (where possible)



### Professional Representative 1.75%

For families seeking a professional executor to be responsible for the estate settlement, with ClearEstate handling the administrative burden, providing total peace of mind.

Same as Probate & Taxes plus:

- ClearEstate's trust partner acts as estate representative, while ClearEstate acts as agent
- ClearEstate carries out entire estate settlement process
- ClearEstate handles all communications with beneficiaries and 3rd parties
- ClearEstate handles data entry of all estate information
- ClearEstate facilitates the set up of the estate bank account, liquidation of assets, and payments of liabilities
- ClearEstate arranges the estate distribution and releases

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 of benefits or features

# Estate Settlement Process with ClearEstate

It takes **~12-18 months** to settle an estate, with average legal and accounting fees of \$12,400 based on average estate size of \$200,000

**ClearEstate** clients often reduce that by **3-6 months**.

