



## Trust & Estate Settlement Fee Schedule

**ACCOUNT SET-UP FEE:** \$750 plus a \$295 hourly fee to secure and valuate assets.

**ANNUAL FEE:** 1.25% on first \$2,000,000  
1.00% on next \$3,000,000  
0.85% on next \$5,000,000  
0.75% on next \$5,000,000  
0.65% on next \$5,000,000  
Negotiable for balances over \$20,000,000  
**Minimum annual fee of \$15,000**

Extraordinary services will be charged at the regular hourly rate of \$295 for such services including but not limited to heir searches, trust litigation, travel expenses beyond those required for normal administration and distribution of the trust, sale and leases of real property and collection activity, partnership or business entity reviews and processing of trust amendments. The annual fee will be paid quarterly based on the highest annual value of the trust.

Trustee will need the services of a CPA for tax returns, fiduciary accountings, investment advisory, and legal services of an attorney specialized in estate planning. The trust may need the services of a real estate agent, licensed contractors, property management, and certified appraisals. These services will be charged separately in addition to the trustee fees.

A full annual fee will be taken on any trust terminating within the first year.

Additional Services/Fees:

-Small Business Management: \$395/per hour  
-Agent for Advanced Healthcare Directive: \$395/per hour

**DISTRIBUTION FEE: 1%**

**REVOCAION/TERMINATION FEE: \$2,500**

Effective Date: 02/01/2024