



Trust & Estate Settlement Fee Schedule

ACCOUNT SET-UP FEE: \$750 plus a \$295 hourly fee to secure and value 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 \$20,000

Extraordinary services will be charged at the regular hourly rate of \$295. These services include, but are not limited to, heir searches; travel expenses beyond those required for normal administration or distribution of the trust; sale or leasing of real property; 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
-Small Business Litigation:	\$495/per hour
-Trust Litigation:	\$395/per hour
-Agent for Advanced Healthcare Directive:	\$395/per hour

DISTRIBUTION FEE: 1%

REVOCATION/TERMINATION FEE: \$2,500

Effective Date: 09/01/2024