



## SOLSTICE FIDUCIARY

### SERVICES

## Trust & Estate Settlement Fee Schedule

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

<b>ANNUAL FEE:</b>	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
	<b>Minimum annual fee of \$20,000</b>

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%**

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

Effective Date: 09/01/2024