



Fee Schedule – 2024*

A minimum monthly fee of \$750 will apply to all trusts. Start-up fees are billed on an hourly basis. Occasionally, our trusts benefit from straight hourly fees rather than asset-based fees, in those instances, we use the lower cost method.

Asset-Based Trustee Fees: For maintenance trusts, asset-based fees are typically used. The following asset-based fees are charged monthly:

Up to \$2,000,000*	1.1%
\$2,000,001 to \$4,000,000	.90%
\$4,000,001 to \$10,000,000	.75%
\$10,000,001 and up	.50%

Hourly and Other Trustee and Third-Party Fees and Costs:

- **Extraordinary Services, Start-Up and Winding Down.** Fiduciary and associates' hourly rates \$125 to \$250 per hour depending upon the service provider and services performed. Professional liability insurance expenses attributable to the trust or estate will be, to the extent possible, expenses of the trust or estate.
- **Third-Party Costs and Fees.** The Trust/Estate is responsible for third-party costs, such as, investment management fees, property management fees, bonding, appraisals, tax filings and defense, specialty accounting services, and legal fees.
- **Real Estate and/or Material Assets.** Sales of real property and other material assets are subject to up to a 1% fee.
- **Litigation and Threat of Litigation.** All work performed for litigation or threat of litigation are billed at \$300 per hour.
- **Other Asset-Based Fees.** The above Asset-Based Trustee Fees do not include third-party investment management fees or third-party real property management fees, excess concierge services or business or entity level work for underlying businesses owned by the trust/estate.

*Hourly fees subject to annual adjustments.