



Trust & Estate Administration

**T. Trevor Murphy, CLPF**

[www.TrusteePro.com](http://www.TrusteePro.com)

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## Living Trust Annual Fee Schedule

**Set-up Fee:** \$375 plus an hourly fee of \$225 to change title and set up new accounts. No fees charged from a continuing trust.

**Management Fee:** 1% on first \$5M; .75% on next \$5M; .50% on next \$10M; Minimum first year Management Fee is \$5,000.

**Extraordinary Fee:** Hourly rate of \$225 for such services including, but not limited to: managing closely held assets; litigation; funeral arrangements; coordination of legal services; accounting/tax work; court proceedings; oversight, maintenance, and/or remodels of real property; disposition of tangible personal property; marshaling financial records and documents.

**Third Party Costs:** Potential additional Third Party Costs, may include but are not limited to CPA/tax services, legal services, litigation expenses, investment advisory fees, taxes, insurance costs, mortgage fees, real estate brokerage fees and other third party professionals

**Incapacity Fiduciary Positions:** Hourly rate of \$225 for serving as Agent for Durable Power of Attorney, Agent for Advance Health Care Directive, and/or Representative Payee for Social Security

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\*Fees Subject to Change (revised Jan/2022)