

Budgeting/Escrow Account Management Services

Budgeting / Escrow Account Management – Features

PLAN is available to receive funds from SSI, SSDI, trusts, families, and to use those funds for the benefit of the individual with a disability.

- PLAN is available to serve as representative payee for Social Security (SSI/SSDI)
- Funds come directly to PLAN from SSI/SSDI, trust accounts and family donations
- Bills for client expenses can be sent directly to PLAN

PLAN's Unique Qualifications for Budgeting / Escrow Account Management

- Over 34 years of experience
- Budget developed by experienced case manager and certified financial planner in partnership with the family and client
- Monthly and annual reporting to family and/or client detailing income and expenditures
- Coordination between Case Management, Trust Management and Escrow Account Management

Escrow Transaction Fee Schedule*

Number of Escrow Transactions	Time (hrs.)	Cost
1-3	.25	\$ 20
4-6	.5	\$ 40
7-9	.75	\$ 60
10-12	1	\$ 80
13-15	1.25	\$ 100
16-18	1.5	\$ 120
19-21	1.75	\$ 140
22-25	2	\$ 160
26 and above	2.25	\$ 180

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Credit Card Transaction Fee Schedule*

Number of Credit Card Transactions	Time (hrs.)	Cost
1	.05	\$4.00
2	.07	\$5.60
3	.09	\$7.20
4	.1	\$8.00
5	.12	\$9.60
6	.14	\$11.20
7	.16	\$12.80
8	.18	\$14.40
9	.20	\$16.00
10	.22	\$17.60
11 and above	.24	\$19.20

*In-depth service provided by PLAN Business Manager will be billed at \$80/hour