PLAN Life Trust Program – Fee Schedule

The principal advantages of PLAN's trust administration program include coordinated case management, no minimum corpus and a graduated fee schedule.

While we require no minimum corpus, start-up costs may absorb a significant portion of a smaller trust. PLAN, a not-for-profit 501(c)(3) agency, offers the following fee schedule for administering Special Needs Trusts, either of Third party or Self-Settled origin:

Start-up Costs

PLAN Membership Fee……...$130

Personal Plan of Care* (Typically 4 case management hours at $85 per hour)…….…… $340

Trust Application Fee……..$500

Total Start Up Costs*……...$970

Trust Administration Fees (incurred upon funding of the trust)

Annual Trust Administration Fee: 1. Corpus under $5,000…….…..……...no fee**

2. First $500,000……..1.5% of corpus

3. Second $500,000……...……...…..……1.0% of corpus

4. Portion of corpus over $1,000,000....……..…0.5% of corpus

Annual PLAN Membership Fee (subsequent years)…….....……..$130 per year

Annual Review of Plan of Care and Budget* (Typically 3 hours of case management)….....…...$240 per year

Property Management Fees (incurred upon inclusion of property in the trust)

Annual Trust Property Administration Fee: 1. First Year……..…...……..... 1.5% of property value

2. Subsequent Years…….……0.5% of property value

Case Management Fee: Usual and customary case management fees may be incurred for services related to managing and maintaining the property.

*Estimate, cost determined by actual number of case management hours.

** Provided that (1) when PLAN first became trustee the corpus was greater than $25,000, and (2) provided that PLAN has been the Trustee for at least one year.