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# *PLAN Life Trust Program – Fee Schedule*

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The 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 up to 5 case management hours at \$100.00 per hour).....	\$500
Trust Application Fee.....	\$500
Total Start Up Costs*.....	\$1,130

## **Trust Administration Fees (incurred upon funding of the trust)**

Annual Trust Administration Fee: 1. First \$500,000.....	1.5% of corpus
2. Second \$500,000.....	1.0% of corpus
2. 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* (Approximately 3 hours of case management).....	\$300 per year

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

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