

Alan J. Statman dba Trust Matters Fee Schedule

Principal

Alan Statman \$210/hr

Senior Fiduciary

Anne Marshall \$200/hr

Senior Level Staff \$175/hr

Senior level staff include licensed fiduciaries and other staff who have achieved substantial levels of experience and competence and have three or more years' experience in trust administration.

Other Staff \$115-\$160/hr

Fees for Other Staff (assistants, bookkeepers, accountants, client specialists) are set depending on the employee's education, experience and level of responsibility.

Billing Policies

- Expenses are billed at cost.
- Invoices are due and payable upon receipt.
- Mileage is billed at standard IRS approved rates.
- Travel time may be billed at standard hourly rates.
- For trust and/or family situations with a high level of complexity, trustee may be paid at reasonable rates different from or exceeding the above rates after appropriate written notice to the beneficiary(ies) or approval of the court.
- For sale, purchase or refinance of real property and at the discretion of the fiduciary, a 1% percentage fee may be charged in lieu of hourly fees associated with the transaction.
- Minimum annual fee is the larger of \$3000 or the fee calculated as follows:
 - First \$5 million in assets - 0.50%
 - Next \$5 million in assets - 0.35%
- Invoices not paid within 30 days will accrue interest at 1% per month.
- If there is a change in billing rates or policies, clients will be provided with 60 days advance notice.
- \$750,000 minimum asset value for new clients
- The above fees apply to trust administration, bill payment services and work done as an agent under a POA.