

# GUARDIAN TRUST

EST. 2002

## Fee Schedule

### General Trust Administration

Guardian Trust provides trust administration for all types of Trusts. The Trustee is the **Guardian Trust Foundation, Inc.**, a Florida not-for-profit corporation that primarily supports organizations that serve individuals with disabilities.

Since we are a non-profit Trustee we must have some sort of a remainder interest in accordance with [Florida Statute 617.2101](#)

Our contingent interest can say something like: “Upon the death of the beneficiary then the non-profit Trustee, Guardian Trust Foundation, Inc., shall receive \$100.00 as a remainder interest. The rest, residue and remainder of the trust estate shall pass to...”

Enrollment fee of \$1,500

Annual Administrative Fee:

0.4 %	Greater than \$5,000,000
0.6 %	\$3,000,001 – \$5,000,000
0.8 %	\$2,000,001 – \$3,000,000
1.0 %	\$1,000,001 – \$2,000,000
1.2 %	\$750,001 – \$1,000,000
1.5%	\$500,001 - \$750,000
2.0%	\$250,001 - \$500,000
2.5%	\$100,000 - \$250,000
3.0%	Less than \$100,000

Upon the death of a Beneficiary, the Trustee charges a closing fee of \$500. Any remaining funds are released according to the trust document.

Additional fees may be assessed for tax preparation, real estate, legal, and royalty management, as well as individual investment services.

Subsequent deposits will be assessed a fee corresponding to the account balance after the deposit is made. Subsequent deposits may be subject to a reduced fee.

The Co-Trustees of the Trusts are practicing Board Certified Elder Law attorneys.

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Effective: June 1, 2020