GUARDIAN TRUST
EST. 2002

Fee Schedule

Pooled (d)(4)(C) Special Needs Trust Administration

Guardian Trust serves as administrator for a variety of Special Needs Trusts, including pooled (d) (4)(c) trust, and third-party pooled special needs trusts.

The Trustee is the Guardian Trust Foundation, Inc., a Florida not-for-profit corporation that primarily supports organizations that serve individuals with disabilities.

Enrollment fee of $500

Annual Administrative Fee charged in advance at the effective rate:

3.0 %	On the first $250,000
2.25 %	On the Next $250,001 - $500,000
1.5 %	On all amounts over $500,000

Upon the death of a Beneficiary, the Trustee retains/charges a closing fee of $500. Then, to the extent that the law permits and sufficient funds remain, the Trustee will fulfill the Medicaid Trust Lien and release remaining funds to the estate, guardianship or to the trustee of a previously established revocable trust established by the Beneficiary.

* The fee percentage is rounded to two decimal places when calculating fees

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: July 29, 2026