

ONGOING TRUST ADMINISTRATION FEE SCHEDULE

Assets	Fee
First 5 Million	1.00%
Next 5 Million	0.85%
Next 5 Million	0.75%
Next 5 Million	0.60%
Greater than 20 Million	Negotiable

Effective January 1, 2024



Note: A fixed rate is applied to the total value of assets, applied quarterly. Real properties are valued annually by taking the average of the estimated market values listed on 2 real estate websites, for example, Redfin and Zillow. During the administration, the value received from any additional property is also included in the fee calculation above. Trust administration fees are determined on a case-by-case basis depending on asset and liability composition and the value of the estate.

Included Fees: The above fixed-rate fee is for standard and ordinary trust administration services. This includes ongoing work done to marshal trust assets, maintain trust assets, oversight of any trust investments or liabilities, fiduciary accountings, financial reports, spending plans and making ordinary distributions. The fixed-rate fee also includes assisting tax professionals with tax reporting and planning, ordinary distributions, and correspondence with beneficiaries and counsel as it pertains to the administration.

Extraordinary Fees: Should such work be required outside of the above scope, such as litigation, historical tax issues, 706 estate tax returns, disposition of tangible personal property, disposition or purchase of real property, business management, work assigned to these efforts will be deemed extraordinary fees and separate from the fixed fee. Such extraordinary work will be billed at our current hourly rate of \$260 per hour (in one-tenth hour increments) for work done by licensed professional fiduciaries, and billed at \$130 per hour (in one-tenth hour increments) for work done by employed staff.

Minimum Fee: The minimum fee charged is \$3,650.

Hitchman Fiduciaries may at times engage the services of outside professionals, including but not limited to, a CPA and/or financial advisor, and outside counsel for the purposes of advising the fiduciaries. Every attempt will be made to limit the costs incurred, however there may be times when the services of a specialist are required to properly administer the trust. We engage the services of a 3rd party professional for investment of liquid assets, filing of taxes, and management of real property.

*Sale of Real Property will incur extraordinary fees as described in the above schedule.

How Can We Help?
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HitchmanFiduciaries.com

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