

PLANNED LIFETIME ASSISTANCE NETWORK OF CONNECTICUT, INC.

P. O. Box 290937 Wethersfield, CT 06129

860-523-4951

Fee Schedule

3rd Party & Self Settled d4a

PLAN of CT Fees

- I Non-refundable Enrollment Fees- To be paid by Grantor**
- | | |
|--|---------|
| One client/trust per family | \$1,050 |
| Two clients/trusts per family | \$1,350 |
| Plus \$300 for each additional client/trust per family | |
| Covers: Personal Care Plan Development | |
| Drafted Trust Documents | |
| Personal Care Plan Review and Revisions as needed | |
- II. Service Fees by Plan of CT** \$ 65/hr.
- Perform Services Requested by Personal Care Plan,
Client Phone Calls, Home Visits, Arranging Support Services,
Check Preparation, Shopping, In-house/Probate Accountings
Other Services Provided by PLAN staff
- Quarterly Administration Fee** \$75/quarter
- Review of rate of spending, investments and Personal Care Plan, Invoice
Preparation, Billing Review, Account Balancing, Statement Mailing, Annual
Account Review, Preparation of requests, Postage
- III Closing Fees** \$65/hr
- Final Accounting, Taxes, Final Report to State (d4a),
Remainder Beneficiary Distribution(s)

Outside Agency Fees

- IV. Financial Management and Tax Reporting of Funded Trusts***
- | | |
|---|-----------------|
| Investment of Assets; investment firm <i>(only for trust accounts greater than \$50,000)</i> | 50 Basis Points |
| Tax Preparation; accounting firm | Market Rate |
| Probate accounting; by law/accounting firm | Market Rate |
- V. Contracted Support Services*** Variable
- Advocacy, Housekeeping and other services not provided by
Entitlements, Care Management, Evaluations, etc.

* The Trust will be billed for these services at cost. Additional time required will be at PLAN of CT's hourly rate.