

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	\$ 60/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	\$60/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 trusts 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.