PLANNED LIFETIME ASSISTANCE NETWORK OF CONNECTICUT, INC.

P.O. Box 4280, Hartford, CT 06106
860-523-4951

Fee Schedule
3rd Party & Self Settled d4a

PLAN of CT Fees

I. **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, Account Balancing, Statement Mailing,
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

III. **Closing Fees** — $60/hr

Final Accounting, Taxes, Final Report to State (d4a),
Remainder Beneficiary Distribution

Outside Agency Fees

IV. **Financial Management and Tax Reporting of Funded Trusts***

Investment of Trust Assets- paid to investor (only for trusts greater than $60,000)	½%/annually
Tax Preparation, outside accounting firm	Market Rate
Probate accounting, outside law firm	Market Rate

V. **Contracted Support Services*** — Variable

Advocacy, Housekeeping and other services not provided by
Entitlements

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

Updated 1/7/2015