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 ½%/annually
     (only for trusts greater than $60,000)
   - Tax Preparation, outside accounting firm Market Rate
   - Probate accounting, outside law firm Market Rate

V. **Contracted Support Services**
   - Advocate, Housekeeping and other services not provided by Entitlements
   - Variable

* 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