



## Fee Schedule

**On going Trustee or co-trustee** of a revocable or irrevocable trust (either inter-vivos or testamentary), Agent or IRA.

Flat annual fee of \$5,000 up to \$1,500,000 of market value per account.

Flat annual fee of \$9,000 on \$1,500,001 up to \$3,000,000 of market value per account.

Flat annual fee of \$12,000 on \$3,000,001 up to \$5,000,000 of market value per account.

Over \$5,000,001 of market value per account negotiated.

One time setup fee and one time closing fee \$500 each. Minimum first year annual fee as outlined above. Fee prorated when account closed after the first year. The hourly rate is \$300 billed in quarter hour increments.

Examples of additional costs are not limited to the following: Any professional support services i.e., attorney, tax preparation, appraisers, investment management, insurance, bonding or any other consultation necessary. Please use the following for legally naming in documents; Gregory A. Kummer dba Trinity Fiduciary Services. The firm website at; [www.tfs-mn.net](http://www.tfs-mn.net)

Signature

Date



## Special Asset Fee Schedule

Personal Fiduciary Services (i.e. Power of Attorney, Trust Protector, ILIT, General or managing partner of a closely held business); negotiated at a flat annual rate.

**One time;** Estate, Trustee or co-trustee of a revocable or irrevocable trust (either inter-vivos or testamentary), Agent or IRA; negotiated at a flat annual rate.

Real estate or business sales; negotiated at a flat percentage rate.

One time setup fee and one time closing fee \$500 each. Minimum first year annual fee as outlined above. Fee prorated when account closed after the first year. The hourly rate is \$300 billed in quarter hour increments.

Examples of additional costs are not limited to the following: Any professional support services i.e., attorney, tax preparation, appraisers, investment management, insurance, bonding or any other consultation necessary.

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