

Arizona Community 3rd Party Trust

Unfunded Trusts
Fee Schedule 2019

This fee schedule is for Grantor(s) who want to establish an unfunded Sub-Trust account with PLAN of Arizona's Pooled Trust.

Set Up Fee: New Clients Only \$1,500.00

A one-time fee to join the PLAN of AZ pooled trusts. This fee includes education on pooled trusts, appropriate disbursements, preparation of the Joinder agreement, budget, preparation of other records and documentation necessary to set up the sub-trust account. This fee is payable to PLAN of Arizona at the execution of the joinder agreement by the Grantor.

PLAN of Arizona Trust Maintenance Fee: Billed annually until the trust is funded. \$200.00

This includes recordkeeping, communication with Grantor or Primary Representative and a 1 hour annual meeting.

All fees are subject to change.

I have reviewed and understand the above information.

Beneficiary Name

Date

Beneficiary/Representative/Grantor

Date