

Settlement and Administration Services are available to our clients. Successor Trustees make the decision to hire our firm upon the disability or death of a trustmaker. *If used*, BENSON & CASE, LLP agrees in advance to the fee arrangement which follows for Lifespan™ members.

**Settlement and Administration Services:\*\*\*\***

***Fixed Fee Option***

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Client Initials

***Variable Fee Option\****

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Client Initials

**Disability:**

Flat Fee (currently \$950)

**Death:**

- File the will of record
- Apply for tax identification numbers
- Initial settlement meeting
- Explanatory letter to beneficiaries
- Transition conference with CPA/FA
- Settlement (asset transfer) assistance
- Instruction letters
- Specific bequest letters

In lieu of an hourly or other billing basis where the fees are unknown, client will be billed as follows:

The fee will be based in part on size (i.e., amount of work) of the gross estate at the time of death and the fee would be calculated to not exceed ¾ of 1% of the gross estate. Based upon circumstances now and what is known now about your estate with an estimated size of \$500,000 the fee, at this time, would be approximately of **\$3,750**. This fee will be reviewed bi-annually at the Client Update Program.

**Death Tax Return Preparation Is NOT included in above fee schedule**

\*\*\*\* Minimum Fee: Up to 9 funding assets \$3,250; 10 to 19 funding assets \$3,750; 20 or more \$4,500  
[“Dormant” clients are subject to a separate fee schedule.]  
[Fee conversion program is available to move from the variable to the fixed fee option.]

**Probate Services:**

Billed at our then-current fee schedule  
(Subject to \$1000 minimum)

**Disability:**

Flat Fee (currently \$950)

**Death:**

- File the will of record
- Apply for tax identification numbers
- Initial settlement meeting
- Explanatory letter to beneficiaries
- Transition conference with CPA/FA
- Settlement (asset transfer) assistance
- Instruction letters
- Specific bequest letters

In lieu of an hourly or other billing basis where the fees are unknown, client will be billed as follows: A flat/fixed fee based upon size of taxable gross estate and which would not exceed:

Based upon circumstances existing now and what is known now about your estate with an estimated size of \$500,000 the fee for settlement cost now would be \$0. This fee will be reviewed bi-annually at the Client Update Program. The fee would be based in part upon the size (i.e., amount of work) of the gross estate at the time of death and is calculated as follows:

Up to amt of 1 <sup>st</sup> “coupon”	2%
Up amt of 2 <sup>nd</sup> “coupon”	1.50%
Amt exceeding 2 <sup>nd</sup> “coupon”	1.25%

**Death Tax Return Preparation Is NOT included in above fee schedule**

**Small Estate Affidavit:**

Fixed fee (currently \$350)

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James D. Evans

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Client