



ESTATE ADMINISTRATION FEES

MARKET VALUE OF ASSETS	FEE
First \$1 Million	3.5%
On The Balance	2.5%

- 3% fee on income earned during administration
- Assets outside of probate subject to a 1.5% fee
- Principal family residence passing to spouse is exempt from fees
- A minimum fee of \$7,500 will apply
- Additional charges will apply if estate/fiduciary tax returns are required

SERVICES PROVIDED

In serving as executor or personal representative, or as agent for either, our company provides or arranges for the following services:

- Collect and secure estate assets
- Appraise estate assets
- Notify creditors and pay debts
- Collect monies owed the estate
- Manage estate assets (real estate, securities, family-owned business)
- Keep detailed records of all transactions
- Submit records to beneficiaries and commissioners of accounts
- Choose tax year for the estate
- Complete and file income and estate tax returns

Fees charged by outside investment managers are separate and apart from the fees payable under this schedule. Services are intended to be all-inclusive. However, if non-routine or extraordinary services are required, additional separate charges will be imposed. Examples include: litigation, real estate management/sales, insurance policy management, court accountings, asset distribution and tax preparation services.