



Shielding the Financial Future of Individuals with Disabilities

Guardian Trust serves as the administrator for a variety of Special Needs Trusts, including self-settled individual (d)(4)(A) trusts, a pooled (d)(4)(c) trust, and third-party special needs trusts.

The Trustee is the Guardian Trust Foundation, Inc., a Florida not-for-profit corporation that supports organizations that serve individuals with disabilities.

Fee Schedule

Third-Party Pooled Special Needs Trust Administration

Enrollment fee of \$500

Annual Administrative Fee:

0.6%	Greater than \$3,000,000
0.8%	\$2,000,001 – \$3,000,000
1.0 %	\$1,000,001 - \$2,000,000
1.5 %	\$500,000 - \$1,000,000
2.0 %	\$250,000 - \$500,000
2.5 %	Less than \$250,000

Upon the death of a Beneficiary, the Trustee charges a closing fee of \$500. Remaining funds are released to remaindermen according to the trust document.

Subsequent deposits will be assessed a fee corresponding to the account balance after the deposit is made. Subsequent deposits may be subject to a reduced fee.

Additional fees may be assessed for individual money management, accounting services, legal services, or the management of unique assets such as real property or mineral interests.

The Co-Trustees of the Trusts are practicing elder law and special needs planning attorneys.

901 Chestnut Street, Suite C, Clearwater, Florida 33756

Tel: (727) 210-1185

www.GuardianTrusts.org

Fax: (727) 754-5948

Effective: July 2, 2018