

LEE R. SAGAL
LRS TRUSTEE

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LRS Trustee (LRS) Fee Schedule for Trust Administration
Effective January 1, 2024

LRS Trustee fees for a trust administration are charged quarterly based on the greater of the Gross Asset Value Annual Percentage Rate (see Schedule A below), prorated, or the aggregate of services performed at our Billable Hourly Rates (see Schedule B below). LRS shall receive compensation for its services as Trustee in the amount and at the time specified in this Fee Schedule for Trust Administration. LRS shall also be entitled to reimbursement for all reasonable expenses incurred on behalf of the trust. Except as provided in this Fee Schedule, the compensation payable to LRS shall not be reduced because LRS retains a custodian, agent, attorney, accountant or investment advisor (including any affiliate of the Trustee) to advise the Trustee concerning the administration and/or investment of the trust estate.

Schedule A: Gross Asset Value Annual Percentage Rate

Asset Value Range	Annual Percentage Rate
First \$2,000,000	1.00%
Next \$3,000,000	0.80%
Next \$5,000,000	0.70%
Next 10,000,000	0.60%
Above \$20,000,000	0.40%

Schedule B: Billable Hourly Rates

Activity	Billing Rate
Business Administration	\$180 / hour
Trust Administration	\$150 / hour
Federal and Local Tax Administration	\$180 / hour
Litigation, Legal Consultation and/or Court Appearances	\$150 / hour
Real Estate Rental Property Management	\$150 / hour
Real Estate Sales Management	\$150 / hour
Bill Payment & Technical Support	\$150 / hour
Fiduciary Assistance	\$150 / hour
Document Preservation	\$150 / hour
Errands and Shopping	\$150 / hour
Software Fee	\$9 / month

Minimum Annual Fee: \$9,500.

Estate Settlement Fee: Upon an applicable death, in lieu of our ongoing annual fees, LRS will bill a one-time Estate Settlement Fee of 1.8% based on the date of death gross asset value of the estate, plus net gain and gross income earned during the post-death administration. Additional hourly fees from Schedule B above will be added for services rendered involving Business Administration and Litigation, Legal Consultation and/or Court Appearances. There may be preliminary distributions made within a year after death, but most estates can take up to three years to fully settle.

By signing below client agrees to the above fee schedule.

Signed: _____

Print Name: _____

Date: _____