

Alan J. Statman dba  
**Trust Matters**  
Fee Schedule

Principal

Alan Statman \$225/hr

Anne Marshall \$210/hr

Senior Level Staff

\$180/hr

Senior level staff include licensed fiduciaries and other staff who have achieved substantial levels of experience and competence and have three or more years' experience in trust administration.

Other Staff

\$125-\$165/hr

Fees for Other Staff (assistants, bookkeepers, accountants, client specialists) are set depending on the employee's education, experience and level of responsibility.

## Billing Policies

- The above hourly fees apply to trust administration, bill payment services and work done as an agent under a POA.
- \$750,000 minimum asset value for new clients.
- Minimum annual fee is the larger of \$3,500 or the fee calculated as follows:
  - First \$5 million in assets - 0.50%
  - Next \$5 million in assets - 0.35%
- Invoices are due and payable upon receipt. Expenses are billed at cost. Mileage may be billed at standard IRS approved rates. Travel time may be billed at standard hourly rates. Invoices not paid within 30 days will accrue interest at 1% per month. If there is a change in billing rates or policies, clients will be provided with 60 days advance notice.