

FUTURE CARE PLANNING SERVICES
First Party Pooled Trust

FEE SCHEDULE: First Party Lump Sum

\$200 enrollment fee

\$3000 minimum opening deposit

(\$2000 minimum opening deposit for people receiving SSI benefits may be considered by the trustee committee.)

GVT charges a fair market price for investment services. Currently, 0.95% annually.

Future Care Trust charges .0625% monthly for administrative fees.

1st Party Lump Sum w/ monthly disbursements

\$10 per check written by Trust

Additional Fees

Stop Payment - \$37.00

Bounced check- \$30.00

Copy of canceled check - \$10

One Day Processing - \$50

Overnight Mail \$25

Annual audit fee of \$50: Automatically withdrawn from each sub-trust account during month of March.