

Fee Schedule

Qualified Personal Residence Trust (QPRT) Administration Fees

QPRT ADMINISTRATION:

(after retained term ends)

Minimum Fee - \$1,500 *(actual fee could be greater)*

SERVICES INCLUDE:

- Preparation and annual renewal of lease/rental agreement
- Collection of lease/rental payments
- Review of homeowner's insurance coverage
- Payment of trust property expenses pursuant to lease rental agreement
- Distribution of income pursuant to trust agreement
- Confirmation of fair market rental value triannually
- Maintenance and retention of records
- Final distribution pursuant to Personal Residence Trust Agreement

ADDITIONAL FEES:

Additional fees may be billed for extraordinary services rendered in administration of Qualified Personal Residence Trusts.

SUCH SERVICES INCLUDE BUT ARE NOT LIMITED TO:

- Repeated requests for lease/rental payments
- Repeated requests for tri-annual confirmation of fair market rental value, proof of homeowner's insurance coverage, or other property-related information

Our services are billed on an hourly basis for all services rendered by attorneys, paralegals, and law clerks.

Out-of-pocket expenses (e.g. Registry of Deeds recording fees, appraisal fees and preparation of fiduciary income tax returns) are charged in addition to our fee.

RESPONSIVE SOLUTIONS

Two simple words that explain our commitment to you. Being responsive is a critical element in building a strong attorney-client relationship. Whether you are a new or existing client, we'll be quick to respond to your needs with the knowledge necessary to find solutions to your legal concerns.

WE HAVE ANSWERS

To learn how we can assist you, contact our Director of Trust and Estate Services, Toni Puopolo Brogna, at 508.459.8080 or at tbrogna@fletchertilton.com.

Fees in effect as of January 1, 2011. All fees are subject to annual review and adjustment. Information update September 2018.