



## GUARDIAN OF THE ESTATE - ADULT

Aligned Partners Trust Company serves in the Court appointed role of Guardian of the Estate for individuals who are no longer able to make financial decisions on their own behalf. As Guardian of the Estate, Aligned Partners prudently manages and invests the individual's assets and makes distributions on behalf of the individual to meet his or her needs. The duties and services that Aligned Partners provides as Guardian of the Estate include the following:

- ✓ File Inventory and Annual Reports with the Court
- ✓ Collect and Protect Assets
- ✓ Manage and Invest Assets
- ✓ Recordkeeping and Accounting
- ✓ Process Distributions
- ✓ Bill Payment
- ✓ Prepare Tax Returns

For the first year after appointment an annual fee of 2% of total assets will apply. For subsequent years, the following schedule will apply:

Asset Range	Annual Fee*
Up to \$2,000,000	1.10%
\$2,000,001 to \$4,000,000	0.90%
\$4,000,001 to \$6,000,000	0.75%
Over \$6,000,000	0.50%

Minimum annual fee is \$5,000.

\* Guardian fees include custody, investment management, guardian and tax preparation services and are subject to Court approval. When unusual or extraordinary services are requested or required, reasonable additional fees may be sought.

