



GUARDIAN OF THE ESTATE - MINOR

Aligned Partners Trust Company serves in the Court appointed role of Guardian of the Estate for minors who have received an inheritance outright. As Guardian of the Estate, Aligned Partners prudently manages and invests the minor's assets and makes distributions on behalf of the minor to meet his or her needs based on Court approval. The duties and services that Aligned Partners provides as Guardian of the Estate include the following:

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

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%

* 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.

