

## Secura Aide - Fee Schedule

### Fiduciary Services Fee Structure

At Secura Aide, we are committed to providing transparent and fair pricing for our fiduciary services. Our fee structure is designed to align with the complexity and value of the services we provide.

#### Trust Management

Asset Value	Annual Fee
Up to \$1 million	1.00%
\$1 million to \$3 million	0.85%
\$3 million to \$5 million	0.75%
Over \$5 million	0.60%

Minimum annual fee: \$5,000

#### Estate Planning

Service	Fee
Basic Estate Plan	\$2,500
Comprehensive Estate Plan	\$5,000 - \$10,000
Complex Estate Plan	Starting at \$10,000

#### Investment Advisory

Asset Value	Annual Fee
Up to \$500,000	1.25%
\$500,000 to \$1 million	1.00%
\$1 million to \$3 million	0.85%
Over \$3 million	0.70%

Minimum annual fee: \$3,000

#### Additional Services

Service	Fee
Financial Planning	\$2,500 - \$5,000
Tax Planning	\$1,500 - \$3,000

Service	Fee
Charitable Giving Strategy	\$2,000 - \$4,000

Please note: 1. All fees are subject to change and may be negotiable based on the complexity of services required. 2. Fees for trust management and investment advisory services are typically billed quarterly in advance. 3. Estate planning and additional services are billed upon completion of the service. 4. We offer a complimentary initial consultation to discuss your needs and provide a personalized fee quote.

For more detailed information or to discuss your specific needs, please contact us to schedule a consultation.

Secura Aide

John B McManus

Licensed Fiduciary, No. 1431

Phone: (805) 504-1220

Fax: (805) 504-1457

Last updated: 09/02/2024