

# Fees & Charges – Inheritance Trusts

*An inheritance trust can help you protect a child's inheritance. Money can be directed straight from a Will into a trust so it is protected from the start.*

*An inheritance trust may suit you if you don't want to put your assets in a trust during your lifetime but would like to leave a trust structure in place to protect your child or children's best interests after you're gone.*

## What will it cost?

Setting up any trust requires sound advice and a certain amount of legal work. We don't charge for our initial advice – after that the costs depend on the number of trusts you wish to set up.

Our set up charges are based on an hourly rate, with minimum fees. We've listed our minimum fees for setting up simple trusts, and will be happy to provide an estimate if your situation is more complex and extra work is needed.

There are usually no ongoing costs until the trust becomes active. This might be when the inheritance is received, or other assets are placed in the trust, or you wish to change the trust in some way.

Activity	Minimum fee (including GST)
First meeting	No charge
Proposal*	\$300
To set up one inheritance trust	\$1,200
To set up two inheritance trusts at the same time	\$1,800
To set up three inheritance trusts at the same time	\$2,400

\* If your family make up or asset structure is complex, you may want us to prepare a Proposal outlining the terms of the trust for you to consider.

If you would like to set up more than three inheritance trusts at one time, we'll be happy to provide an estimate.

Other costs	Fee (including GST)
Hourly rate – level 1	\$210 an hour
Hourly rate – level 2	\$240 an hour
Hourly rate – level 3	\$275 an hour