

Trusts, Wills, EPAs & Estate Administration

Price List

Products and Services	Fees (GST Inclusive)
Wills <ul style="list-style-type: none"> • Online Will • New Standard Will¹ (per individual) • New Comprehensive Will² (per individual) • Complex Will³ • Re-draft of a Trustees Executors' Will (simple changes) • Re-draft of a Trustees Executors' Will (complex changes) 	\$120 \$320 \$470 Time and Attendance \$250 \$320
Enduring Powers of Attorney (EPAs) <ul style="list-style-type: none"> • New EPA (single document) • New EPA (Property and Personal Care and Welfare) • New EPA (Property and Personal Care and Welfare – mirrored for a couple) <p><i>Trustees Executors cannot be appointed Personal Care and Welfare Attorney</i></p>	\$290 \$580 \$870
Trusts <p>While every Trust is established for different requirements, a typical Family Trust set up involves the following: Initial set up cost which includes Trust Deed, Opening Resolution, Memorandum of Wishes, Sale Agreement, Acknowledgement of Debt and/or Deed of Gift. <i>This does not include any legal conveyancing fees or costs involved of transferring financial assets across to the trust.</i></p> <ul style="list-style-type: none"> • Transfer of residential property to Trust – no mortgage or other charges/encumbrances at time of establishment • Transfer of Financial Assets to Trust • Liaison with External Party • Complex Trust Structures 	Starts from \$2,875 \$450 + disbursements Time and Attendance From \$450 ⁴ Seek estimate
Ongoing Trust Management Fees <ul style="list-style-type: none"> • Annual Trustee Review • Statement of Accounts Preparation (annual) • Tax Return Completion • Income Handling Fee (calculated on the gross income collected if applicable) • Rental Income Handling Fee (if applicable) • Annual Investment Review (if applicable) • Ongoing Gifting 	From \$633 ⁴ From \$575 ⁴ From \$260 ⁴ 5% 7.5% +GST From \$633 ⁴ \$350 per person

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Estate Administration <ul style="list-style-type: none"> Establishment Fee (includes first meeting with beneficiaries, reading of the Will, explanation of process) Probate when Trustees Executors is Executor Probate when Trustees Executors is Co-Executor Administration and Distribution 	From \$1,000 ⁴ \$1,500 \$1,800 Time and Attendance
Miscellaneous Fees <ul style="list-style-type: none"> Travel to Client <20km Travel to Client >20km Extra witness to documents when external travel required 	\$50 per trip \$65 per trip \$35
Time and Attendance Fees <ul style="list-style-type: none"> Trust Manager Legal Services Administration Duties Accounting and Tax 	Per hour ⁵ \$322 \$350-\$520 \$230 \$287.50-\$322

¹ An example of a **Standard Will** is when all of the estate passes to immediate family.

² An example of a **Comprehensive Will** includes situations involving blended families, a large number of beneficiaries, ongoing funds to be held on trust and uneven distributions to family.

³ An example of a **Complex Will** involves business assets, partnerships, companies, establishing trusts, life interests and right of residence (this means someone can stay in your home for their lifetime before it goes to beneficiaries).

⁴ Where fees are listed as from, additional fees (if applicable) will be charged on a time and attendance hourly rate as scheduled.

⁵ Time and attendance is charged on a part hour basis, pro rata to the applicable hourly rate.

Talk to us

We're here to help. If you have any questions about our fees, please contact one of our Trust Managers on 0800 878 783 or via email at enquiries@trustees.co.nz.

The fees and charges in this guide are inclusive of GST (except where stated otherwise) and are subject to change. Fees are valid as at May 2022. Please check with us to ensure the information is current. This guide is for information purposes only. Its content is intended to be of a general nature and does not take into account your individual circumstances.

Please contact us or seek independent assistance if you want to find out how this information applies to you.