



Schedule of Fees

Trustees Private Wealth, providing New Zealanders with exceptional personal financial services since 1881

Products and Services	Fees
<p>Wills</p> <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) 	<p>\$120</p> <p>\$320</p> <p>\$470</p> <p>Time and Attendance</p> <p>\$250</p> <p>\$320</p>
<p>Enduring Powers of Attorney (EPAs)</p> <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>Trustees Executors cannot be appointed Personal Care and Welfare Attorney</p>	<p>\$290</p> <p>\$580</p> <p>\$870</p>
<p>Trusts</p> <p>While every Trust is established for different requirements, a typical Family Trust set up involves the following:</p> <p>Initial set up cost which includes Trust Deed, Opening Resolution, Memorandum of Wishes, Sale Agreement, Acknowledgement of Debt and/or Deed of Gift.</p> <p>This does not include any legal conveyancing fees or costs involved of transferring financial assets across to the trust.</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 • Liaison with External Party 	<p>Starts from \$2,875</p> <p>\$450 + disbursements</p> <p>Time and attendance From \$450⁴</p> <p>Seek estimate</p>
<p>Ongoing Trust Management Fees</p> <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 	<p>From \$6,334⁴</p> <p>From \$6,444⁴</p> <p>From \$483⁴</p> <p>5%</p> <p>7.5% +GST</p> <p>From \$633⁴</p> <p>\$350 per person</p>



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Products and Services	Fees
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 ExecutorProbate when Trustees Executors is Co-ExecutorAdministration and Distribution	From \$1,000 ⁴ \$1,500 \$1,800 Time and attendance
Miscellaneous Fees <ul style="list-style-type: none">Travel to client <20kmTravel to client >20kmExtra witness to documents when external travel required	\$50 per trip \$65 per trip Time and attendance
Time and Attendance Fees <ul style="list-style-type: none">Trust ManagerLegal ServicesAdministrative DutiesAccounting and Tax	Per hour⁵ \$322 \$450-650 \$230 \$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.

We're here to help

Our Trust Managers are here to take your enquiry

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