

DENALI PAYEE SERVICES  
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**TRUSTEE SERVICES**  
**MEDICAID INCOME QUALIFYING TRUST (MILLER TRUST) FEE SCHEDULE**  
**2013**

Denali Payee Services (DPS) will review each case on its own merits. This fee schedule will remain in effect until further notice.

**Direct Client Trustee Services:**

These services are defined as directly relating to fulfilling the duties and/or responsibilities of serving in the role of Trustee. Services are provided to assure that each beneficiary receives the necessary financial management as outlined in the Trust.

**Fees Payable to the Trustee:\***

Set up fee: This is a one time, non-refundable set up fee of \$150. This amount can be paid from the Trust corpus.

Monthly fee: \$75.00 – flat fee.

**Other Costs:**

Actual costs, including but not limited to, bank fees, check orders, Trust Registration Fee, yearly (non-refundable) stamp charge of \$44, excess postage fees. The stamp charge is based on the current price of one roll of stamps. This is subject to change to reflect any increase by the Postal Services. These fees are payable by the Trust.

The client must have a minimum of \$85 assigned to the Trust each month. This amount covers the Trustee fee and the monthly bank fee (if applicable). This amount may be increased due to any additional and allowable Trust expenses (i.e. attorney's fees for Trust preparation).

**Other Requirements:**

When possible, all Medicaid countable income will be direct deposited into the Trust. The client is responsible for completing and submitting the necessary paperwork for these direct deposits. In the event that Social Security or any other income source will not direct deposit funds into the Trust, the beneficiary is responsible for depositing the Medicaid Income Standard Overage amount to the Trust no later than the 5<sup>th</sup> day of each month. Failure to do so, will compromise the Trust and put Medicaid and other needs based benefits in jeopardy. As Trustee, I am obligated to report this noncompliance to Medicaid and other agencies that require this Trust for program eligibility.

Trustor is responsible for maintaining Medicaid eligibility in all other areas outside of the Trust.

DATED: \_\_\_\_\_

\_\_\_\_\_  
Trustor –

DATED: \_\_\_\_\_

\_\_\_\_\_  
Diane Miller for Denali Payee Services  
Trustee for the \_\_\_\_\_ Irrevocable Income Trust

\* Please note that the Trustee fees are separate from any legal fees incurred due to the actual preparation of the trust by an attorney.