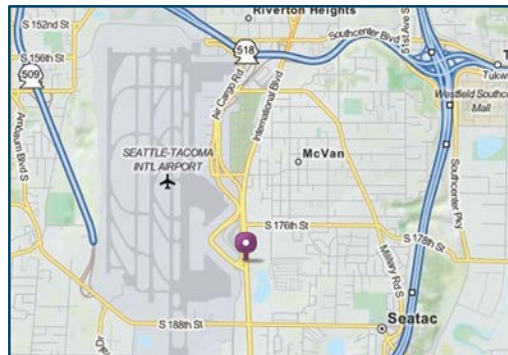


## SeaTac and Bellevue Locations

### SeaTac Office

18000 Pacific Hwy. S Suite 550  
Seattle, WA 98188  
206-246-8772



## Professional Trust Administration Services

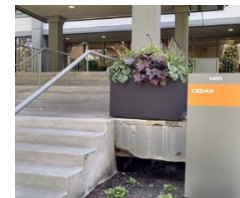
REHBERG LAW GROUP, PLLC, WILL SERVE AS A PRIVATE FIDUCIARY FOR CLIENTS INTERESTED IN PROFESSIONAL TRUSTEE SERVICES.

### TRUSTEE RESPONSIBILITIES

- Safekeeping of assets and investment management oversight.
- Notifications to beneficiaries and creditors.
- Keeping beneficiaries reasonably informed.
- Periodic distribution of income or principal as authorized in the Trust document. Objectivity and fair judgment are needed in cases where the Trust document gives the Trustee broad discretion to provide for the beneficiaries.
- Maintaining records of all transactions, preparing periodic accountings of assets and disbursements, paying bills and performing other administrative functions.
- Preparation of federal and state trust income tax returns, generation-skipping transfer tax filings and beneficiary tax filing notices.
- Terminating the Trust and distributing the Trust assets as specified in the Trust document.

### Bellevue Office

Bellefield Office Park  
Cedar Bldg  
1400 112th Ave. SE Suite 100  
Bellevue, WA 98004  
425-462-6132



### Directions to Bellevue Office:

From I-405 take exit SE 8<sup>th</sup>.  
At the bottom of the ramp, turn west onto SE 8th.  
Turn south onto 114th Ave. SE and over bridge.  
Go over 4 speed bumps.  
Turn right, just before the next bridge.  
Cedar Building (1400), Suite 100 is straight back.  
When entering the building, go past the stairs and to the right.

Contact Us:

Toll Free: 877-246-8772 Fax: 206-454-7910  
[contact@rehberglaw.com](mailto:contact@rehberglaw.com)  
[www.rehberglaw.com](http://www.rehberglaw.com)



---

**Rehberg Law Group, PLLC**, provides a full range of personal trust services including, acting as a Private Corporate Trustee.

Choosing who will serve as Trustee of your personal Trust is an important decision that deserves careful consideration. The Trustee you select must have the skill, perspective and judgment, as well as the time, to adequately perform a wide range of duties. Since the Trustee is responsible for carrying out the terms of your Trust, you should have implicit faith in whomever you choose.

You can appoint an individual or an institution to serve as Trustee. Some people choose a family member or friend, preferring a personal approach to the trust management process. While this may be appropriate for certain simple trust arrangements, it is not always the best choice. Family members may have little or no experience in acting as a fiduciary. They are also subject to emotions, conflicts of interest and biases that may thwart your intentions.



**Professional with a personal touch.**

---

---

Rehberg Law Group, PLLC, serving as a private trustee, offers the advantage of experience and expertise in trust management and fiduciary services, along with the personal touch, serving as your trusted advisor. Our goal is to be available on a personal level to the needs of your beneficiaries.



**Estate Settlement Fees:** When Rehberg Law Group, PLLC is asked in its role as Trustee or Personal Representative to perform estate settlement services, a flat or hourly fee (depending on the project) will be charged in addition to our annual fees. Estate settlement duties include, but are not limited to situations when Rehberg Law Group, acting as Trustee or Personal Representative is called on to arrange the sale of personal assets of the decedent, review and file the estate tax returns, and file the notice to creditors. In situations when Rehberg Law Group also serves as attorney in the probate of the estate, our standard fee for probates is billed by the hour, or negotiated at a flat fee according to the client's preference.

---

---

WE ARE WITH  
YOU EVERY  
STEP OF THE  
WAY.



---

### **ANNUAL FEES \***

*Annual fees are based upon the value of assets under management. The overall % is reduced as the assets grow:*

- First \$1 Mil—fee is 1%
- Next \$2 Mil—fee is 0.85%
- Next \$1 Mil—fee is 0.75%
- All over \$4 Mil—fee is 0.5%
- Minimum annual fee is \$3,500
- Trust Set-up fee—\$3,500
- Trust Termination fee—\$2,500

The fees are normally billed in January for the previous year and are based upon the highest value of the assets during the previous year.

### **Irrevocable Life Insurance Trusts:**

Prior to Trustor(s) Death:

- \$500 per year when only one life insurance policy
- \$100 per year for each additional policy

\*our fees are subject to change without written notice

---