



PLAN|NJ

Planned Lifetime Assistance Network of New Jersey

Lifetime Advocacy for People with Differing Abilities

PLAN|NJ FEE SCHEDULE

LifePLAN, CASE MANAGEMENT AND GUARDIANSHIP SERVICES

PLAN|NJ is a statewide non-profit agency dedicated to helping families answer the question “Who will care for my loved one when I’m gone? We provide advocacy, guardianship and case management to people with disabilities and those with mental illness, as well as planning and support services to families. Our goal is to improve the quality of life for the people we serve and increase access to community support services and resources. Advocacy is the cornerstone of all our services.

We offer education and initial consultation to families and people with disabilities or mental health challenges, at no cost, to discuss immediate and future planning and support needs. We provide LifePLAN development and professional support services as outlined below.

LifePLAN DEVELOPMENT

A comprehensive LifePLAN is created to identify a loved one’s current and future support needs and to determine how those needs will be met. It captures the person’s hopes, goals and preferences and highlights the family’s wishes for his or her care, well-being and security. The LifePLAN contains detailed information about the person’s abilities, aptitude, background and history in key areas including medical, residential, education and employment, significant relationships, hobbies and recreational activities, as well as financial and legal issues.

A one-time fee of \$900 is charged to develop a LifePLAN. It is maintained at PLAN|NJ and updated on a regular basis at no charge.

ADVOCACY, CASE MANAGEMENT SERVICES AND GUARDIANSHIP

- **Advocacy:** PLAN|NJ provides time limited coordination of care and Advocacy Services to resolve critical issues and imperative concerns on an as needed basis.
- **Case Management / Home Visit Monitoring:** PLAN|NJ staff visit at least once per month or as specified in the LifePLAN to assess the person’s wellbeing, health, and happiness, as well as ascertain unmet needs. Planning meetings are attended to provide advocacy, support, and to contribute to the development of goals. PLAN|NJ can also serve as power of attorney and health care proxy with Home Visiting Monitoring services. Average annual cost is \$3,500-\$5,000*.
- **Guardianship:** PLAN|NJ serves as guardian or successor guardian of a person and/or property, with an emphasis on self-determination and quality of life. Monthly Home Visit Monitoring, Advocacy Services and court reporting are included. Average annual cost is \$3,500 to \$6,000*.

The fee for Home Visit Monitoring, Guardianship, and Short-Term Case Management Services, as well as travel to and from visits is \$115 per hour. The maximum billed for travel is 45 minutes each way (1.5 hours round trip). Services on a sliding scale or pro bono basis may be available. *Average annual cost is based on one visit per month (12 visits per year) and attendance at one planning meeting. Actual annual cost of services is based on the frequency of visits requested and number of hours of service.

For more information about PLAN|NJ services, please visit our website at www.plannj.org or call (908) 575-8300 x28.

PLAN|NJ Fee Schedule approved by the Board of Directors June 15, 2018, is considered current through December 2021. Fees are subject to change.

PLAN|NJ FEE SCHEDULE (continued)

TRUST ADMINISTRATION

PLAN|NJ provides professional Special Needs Trust administration services. We possess expertise on the rules governing allowable disbursements and means-tested public benefits, such as Supplemental Security Income (SSI), Medicaid, housing, and food stamps, to protect these entitlements. We serve as trustee for Third Party and Self Settled Private Trusts, as well as the PLAN|NJ Community Trust. Our goal is to achieve the maximum benefit of resources to enhance the lives of the people we assist.

Types of Trusts

Private: Free-standing, individual (not pooled) Special Needs Trusts are written by attorneys for the benefit of a person who lives with a disability. These trusts are designed to protect eligibility for the means tested public benefits referenced above. They are intended to supplement, but not replace public benefits, and enhance quality of life.

Pooled PLAN|NJ Community Trust: This pooled Special Needs Trust enables a person to hold a sub-account within a Community Trust that has significant value. Participation provides investment returns calculated based on the value of the entire trust and professional financial management otherwise unavailable to smaller trust accounts. Sub-accounts may be either Third Party or First Party Special Needs Trusts and are separately accounted for on a monthly basis.

Fees

Enrollment: A onetime set-up fee of \$700 is charged to the PLAN|NJ Community Trust sub-accounts, and \$900 to individual Private Trusts when the accounts are initially funded. The minimum funding requirement for PLAN|NJ to serve as trustee for either type of trust is \$25,000.

Trust Administration: The fee for ongoing management of an individual Private Trust or PLAN|NJ Community Trust sub-account are calculated quarterly, based on the ending market account value as defined below:

- ♦ Quarterly ending account balance of \$15,000 or less: 0.875% (3.5% annually)
- ♦ Quarterly ending account balance greater than \$15,000: \$450 (\$1,800 annually) or the NJ statutory rate, whichever is greater.

NJ Statutory Rate:

- 0.5% of principal (corpus) plus 6% of income for the first \$400,000.
- 0.3% of principal (corpus) plus 6% of income for corpus in excess of \$400,000.

Annual trust tax preparation fee: \$350 - \$600

PLAN|NJ trustee fees are applicable regardless of transaction activity in the account. PLAN|NJ trustee fees do not include investment management fees, which vary according to the fund manager, total trust assets and other factors.

For more information about PLAN|NJ Trust services, please visit our website at www.plannj.org or call (908) 575-8300 x 25.

Client/Guardian/POA (Print)

Client/Guardian/POA (Signature)

Dated