

RESTRICTED CUSTODIAL ACCOUNT INCOMPETENT ADULT

C³BR

(FOR USE IN GUARDIANSHIPS, CONSERVATORSHIPS, AND
DECEDENT'S ESTATES AND TRUSTS FOR INCOMPETENT ADULTS)

Traditional Account Option

Distribution Option

No distribution without a court order.

Account assets are not protected from third party claims or creditors.

Government benefits and financial aid eligibility are reduced.

C³BR Account Solution

Distribution Option

No distribution without a court order.

The Court can preauthorize the trustee to make distributions for the benefit of the Beneficiary in the following categories:

- Health
- Education
- Legal
- Support & Maintenance

HEMS Restricted Distribution Option

The preauthorized distributions are subject to the following stipulated limits as ordered by the court:

- Single distribution limit
- Combined distribution limit
- Combined annual distribution limit

BENEFICIARY RETAINS THE RIGHT TO PETITION THE COURT FOR ADDITIONAL OR ALTERNATE DISTRIBUTION(S)

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ACOMTA

Association of Court Ordered
and Monitored Trusts and Accounts
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FEES

One-Time Setup Fee

Waived

Annual Trustee Fee

Waived – Restricted Accounts Are Credited with the National Average Money Market Rate.

Transaction Fees

Check, Wire Funding Additions	Free
Lost Distribution Check	\$35 Per + Bank Stop Payment Fee
NSF Return Item	\$35 Per + Bank NSF Fee

Distribution Fee

Check	Waived
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Extraordinary Fees

Outgoing Wire Fee Domestic	\$30 Per Wire
Outgoing Wire Fee Foreign	\$75 Per Wire
Overnight Courier and Certified Mail	\$25 + Courier/Postage Cost
Extraordinary Requests or Requirements	\$125 Per Hour + Out of Pocket Costs
Printed and Mailed Quarterly Statements	\$60 Per Annum