

# Fox & Lalonde, LLC

## Retirement and Welfare Plan Services & Fee Schedule\*

### PLAN SET-UP

Comprehensive Plan Document(s) and Actuarial	\$2500.00
IRS Submission Fee (if required)	Cost
412(e)(3) with life insurance benefit, add	\$1,000.00
Less: Fee subsidies (If any)	T/B/D
Takeovers	QUOTED

### BASIC ANNUAL ADMINISTRATION

Preparation of Form 5500 Series and Participant Records	\$2,000.00**
Plus, each participant	\$35.00/ part.

### MISCELLANEOUS CHARGES (as needed)

Participant Termination & Retirement Benefit Calculations	\$175.00/ hour
Trust Reconciliations (if applicable)	\$175.00/ hour
Life Insurance Policy(ies) in Plan per company	\$500.00
Preparation of Form 5558 (Application for Extension of Time)	\$100.00/ each
Plan Termination	\$1,500.00
Special Request and Projects, Self-directed Accounts, non-publicly traded real estate or other assets - \$500.00 minimum	\$225.00/hour
Participants' Inquiries (written authorization received in advance)	\$175.00/ hour
Summary Plan Description Booklets	Draft included with Plan doc.
Extraordinary Administration charges, if any	\$175.00/ hour
All Other Consulting Charges	\$225.00/ hour
Plans in excess of 100 participants	QUOTED

A facsimile of the signature below shall be as valid as the original for purposes of this document.

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Plan Sponsor Approval & Signature	Date	For Fox & Lalonde, LLC	Date

#### Contact Information:

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or

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**Fox & Lalonde, LLC**  
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\* Fees for plan documentation and administration only. Set-up fee for a Standardized Profit Sharing or Add-on Welfare Benefit Plan is \$1,500 per plan; Single person 401k \$1,250; Add-on Solo 401k only: \$500, plus hourly.

\*\* Base admin fee beginning in the second administrative year is reduced by \$500 on Profit Sharing Plans and Welfare Plans if there are multiple plans. Guarantee: Base admin will not exceed base set-up fee.

\*\*\*Trustee fees add \$25 for each transaction over 12 (see individual schedule for all extra charges)