

“General Needs” Custodial Medical Agreement Fees (CMA)

The annual custodial fee is based on the total allocation for the custodial medical agreement (CMA) account. The amount of the total allocation must be cited within the Custodial Agreement or Settlement Agreement.

NO SET UP FEE (Annual fees are due and payable at the beginning of each account's fiscal year. If the CMA terminates for any reason during the first year, the first year's fee is non-refundable. *Accounts open for less than seven(7) years will have to be reviewed on an individual basis and may require additional fees. Please contact our office for further details. *)

Total CMA Allocation		Flat Annual Fee
\$2,500	to \$20,000	\$ 500.00
\$20,001	to \$40,000	\$ 750.00
\$40,001	to \$60,000	\$1,000.00
\$60,001	to \$80,000	\$1,250.00
\$80,001	to \$100,000	\$1,500.00
\$100,001	to \$125,000	\$1,750.00
\$125,001	to \$150,000	\$2,000.00
\$150,001	to \$175,000	\$2,250.00
\$175,001	to \$200,000	\$2,500.00
\$200,001	to \$250,000	\$2,750.00
\$250,001	to \$300,000	\$3,000.00
\$300,001	to \$350,000	\$3,250.00
\$350,001	and higher	\$3,500.00

Accounts that include the preparation of a 1041 Grantor tax return will have an additional fee of \$200 for Federal returns and \$100 for state returns filed. Usually the owner of the reversionary interest of the MSA accepts a 1099-INT income statement thereby negating the need for filing a 1041 tax return.

Note: Medi-Bill, Inc. does not provide a payroll service and does not engage in independent contractor agreements. For those beneficiaries that require non-agency attendant care, we strongly recommend that a payroll service be engaged. The additional fees of a payroll service and associated costs such as taxes and insurance are not the responsibility of Medi-Bill, Inc. However, Medi-Bill, Inc. will administer the information that a payroll service requires.

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Medical Trust Administration
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