

# BLOCKED MINORS ACCOUNT

(FOR USE WITH MINORS ONLY)

C<sup>3</sup>BR

## 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.

## C<sup>3</sup>BR Account Solution

### OPTION 1: Distribution Option

No distribution without a court order.

### OPTION 2: Preauthorized Distribution at Specified Ages(s)

Court preauthorizes the trustee to make distributions upon the Beneficiary obtaining one or more specified age(s).

Up to 5 specific age-based distributions allowed.

Example: \$30,000 funding Distribution(s) scheduled as follows:

- ✓ AGE 18 \$5,000
- ✓ AGE 25 \$10,000
- ✓ AGE 30 \$15,000

Note: Accumulated interest is disbursed with the last scheduled distribution.

\* See notice option

### Notice Option

Written notice is mailed upon the Beneficiary obtaining each specified age.

If the Beneficiary does not respond with a request to withdraw within 90 days of the notice, the unrequested DISTRIBUTION SHALL be deferred until the next specified age.

In the event the distribution is the sole remaining distribution; written notice to the Beneficiary will be provided annually until such time the Beneficiary requests a distribution.

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

For more information contact:

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## FEES

### One-Time Setup Fee

Waived

### Annual Trustee Fee

0.50% (0.0050)

### Transaction Fees

Check, Wire Funding Additions

Free

Lost Distribution Check

\$35 Per + Bank Fee

NSF Return Item

\$35 Per + Bank NSF Fee

### Distribution Fee

Check

\$40

Outgoing Wire Fee Domestic

\$60 Per Wire

Outgoing Wire Fee Foreign

\$75 Per Wire

### Extraordinary Fees

Overnight Courier and Certified Mail

\$25 + Courier/Postage Cost

Extraordinary Requests or Requirements

Starting at \$125 Per Hour +  
Out of Pocket Costs

Printed and Mailed Quarterly Statements

\$60 Per Annum

Pass Through Legal Expenses

Cost