

Fee Schedule for Managing Wealth – Real Estate Services

With a holistic and objective planning-based approach, Key Private Bank can provide you with tailored advice and actionable wealth strategies, including a broad array of solutions for investments, trusts and estates, and banking.

Real Estate Services

- A. For real estate held where Key Private Bank has no management responsibility (as indicated by a signed waiver on file), the title holding fee will be \$750 per year.
- B. For real estate held where Key Private Bank has management responsibility, the market value of the real estate will be included in the overall market value of the account and subject to the market value fee calculation for the account.
- C. For the purchase or sale of the real estate where a broker is used, a fee of up to 3% of the sales price (with a \$500 minimum) will apply, in addition to the charge assessed by the broker.
- D. For the purchase or sale of real estate where a broker is not used, a fee of 7% of the sales price (with a \$500 minimum) will apply.
- E. For property management services, a fee of 4% to 10% of gross income will apply.
- F. For sale of timber interest, a fee of 10% of the gross sales price will apply.

Mineral, Oil & Gas Interest Services

- A. For the setup of new mineral, oil and gas interests in an account, a fee of \$200 per asset will apply.
- B. For mineral, oil and gas interests, an annual fee of \$100 per asset will apply.
- C. For production mineral, oil and gas interests, a fee of 6% of the gross revenue will apply.

Other Real Estate Services

- A. For the management of environmental clean ups, a fee of \$200 per hour will apply.
- B. Fees for all other real estate services will be computed and charged based on an hourly rate of \$200 for services performed by a professional and \$125 for services performed by a paraprofessional.

Compensation of third-party professionals employed by KeyBank on behalf of the account shall be in addition to fees charged by KeyBank for its services.