

PAGE FIDUCIARY SERVICES

12501 Burbank Blvd., #4-109
Valley Village, CA 91607-1637
www.pagefiduciary.com

Tel: (818) 623-0099
Fax: (818) 623-8359
ellie@pagefiduciary.com

California Professional Fiduciary, License #317
National Certified Guardian

PROFESSIONAL FIDUCIARY FEE SCHEDULE

Agent Under Power of Attorney/Agent Healthcare Directive
Guardianship/Conservatorship of the Person
Guardianship/Conservatorship of the Estate
Concierge Services

Description of Services	Hourly Rate
I. Clerical: open, review, sort out incoming mail, set up filing system, on-going general office filing.	\$35.00
II. Bookkeeping: bank deposits of funds received, review of validity and payment of bills, review of validity and petty cash disbursements, monthly bank account statement reconciliation.	\$85.00
III. Fiduciary Duties: court appearances, preparation of documents for court, visiting client at home/hospital/facility, communication with attorneys, doctors, facility staff, opening/closing bank accounts, handling investments through CPA, CFP, brokers, etc., facilitating income, trust, estate tax preparation, phone calls, emails to/from family members, real estate management, buy/sell real estate, housekeeping, and care-giving staff management. The hourly rate will vary depending on the complexity of the task being performed.	\$185.00-\$245.00

PAGE FIDUCIARY SERVICES

**12501 Burbank Blvd., #4-109
Valley Village, CA 91607-1637
www.pagefiduciary.com**

**Tel: (818) 623-0099
Fax: (818) 623-8359
ellie@pagefiduciary.com**

**California Professional Fiduciary, License #317
National Certified Guardian**

Trust Administration

Trustee is compensated at a percentage rate of the total assets of the trust, ranging from 1.0% to 2.0% per annum paid quarterly.

If the total assets of the trust are under \$500,000.00, hourly rate is applied. More complex matters may be subject to additional fees based on extraordinary services provided and are billed at hourly rate.

Minimum annual fee: \$6,000.00

Probate Administration

Pursuant to Probate Code §10800, statutory fees are calculated as follows for probate estates:

- 4% of the first \$100,000.00
- 3% of the next \$100,000.00
- 2% of the next \$800,000.00
- 1% of the next \$9,000,000.00
- 0.5% of the next \$15,000,000.00
- Court discretion after \$25,000,000.00

More complex matters may be subject to additional fees based on extraordinary services provided and are billed at hourly rate. Extraordinary fees are subject to court approval.