



## PROFESSIONAL FIDUCIARY FEE RANGE SCHEDULE

### **Non-Court Supervised Trusts (Calculated Annually on Gross Market Value of Trust Assets)**

Fees are tiered and range from .35% - 1% per annum\* for usual and customary services subject to the size of the Trust, type and complexity of assets and services provided.

Additional trustee fees may be charged at hourly rates ranging from \$150 - \$185 per hour for unusual/extraordinary services such as, but not limited to, complex tax issues, complex real property sales and litigation.

*\*Or hourly at \$150 - \$185/hour if time exceeds % calculation, with a minimum fee earned per annum of \$3,000.*

### **Other Non-Court Supervised Matters (Agent Under Power of Attorney, Special Trustee, Trust Protector, Accountings, Consulting Services, Extraordinary Witness Services, etc.)**

Billed Hourly at \$150 - \$250/hour depending on size, nature and difficulty of matter.

### **CA Probate Administration**

Fees payable to the Professional Fiduciary as the Personal Representative/Administrator for customary services are authorized under Probate Code §10800 and, pursuant to Probate Code §10800 are computed on a fee base comprised of gross assets, plus receipts and gains, less losses, as follows:

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

In addition to statutory fees, pursuant to Probate Code §10801, extraordinary fees can be requested for services such as, but not limited to, tax issues, real property sales and litigation. Though fees for extraordinary services are subject to court approval, extraordinary services are charged at the hourly rate of \$150 - \$185/hour.

### **Other Court Supervised Matters**

- Trusts – \$150 - \$185/hour, subject to court approval
- Guardianships/Conservatorships – \$150 - \$185/hour, subject to court approval
- Other Matters - \$150 - \$185/hour, subject to court approval

*This fee schedule is subject to annual revisions and adjustments. Time billed hourly is in 1/10 hour increments. Fee percentages are calculated at the onset of administration and recalculated annually. Fee percentages are considered earned at the time of calculation but are paid in 12 subsequent monthly installments.*