



Reliant Fiduciary Services

Stabilizing Today | Securing Tomorrow

Fee Schedule

As a California licensed private professional fiduciary, I am committed to transparency and fairness in billing practices. Fees for fiduciary services may be structured in one or more of the following ways, depending on the nature of the engagement and court requirements if applicable.

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Fiduciary Services

Billed monthly at **\$250** per hour, calculated in six-minute increments for services such as: agent for durable power of attorney, trust administration, estate administration, representative payee for Social Security or other government benefits, coordination and oversight professionals such as accountants, real estate agents, financial planners, and business partners.

Trust Administration

Engagement Fee: A **\$1,500** nonrefundable engagement fee is billed to cover client intake.

Hourly Billing: For trusts valued under \$3M, an hourly rate of **\$250** will be billed monthly in six-minute increments with a **\$5,000** minimum annual fee.

Percentage Billing (AUM): For estates valued at \$3M or more, a percentage of the estate's value is billed monthly in tiers as follows:

- \$3M - \$7M: **1.0%** on the first \$7M, plus;
- >\$7M - 15M: **0.75%** on the next \$8M, plus;
- >15M: **0.5%** on \$15M and above.

Assets Under Management: AUM is calculated upon engagement of services and thereafter at the end of each calendar year.

Extraordinary Services

In addition, extraordinary services requiring a significant time investment or handling of complex matters may be billed as extraordinary services at an hourly rate of **\$250**. Extraordinary services may include: resolving disputes, contests, claims, or litigation; managing real properties; overseeing, managing, or liquidation of a business; and overseeing and managing tax-related matters.

Court-governed Matters

Estate administration, conservatorships, guardianships, and other matters governed by the court will be billed at the allowable rate according to local court guidelines.

Other Professionals

Services by other professionals are to be paid from estate assets.