

*Cindy L. Press, C.L.P.F. & National Certified Guardian
Press Fiduciary Services, LLC*

SCHEDULE OF FIDUCIARY FEES

(Posted April 2025)

<u>DESCRIPTION</u>	<u>FEE</u>
<u>Fiduciary Rate:</u> Includes trustee, conservator, attorney-in-fact duties under powers of attorney, and extraordinary estate representative services include, but are not limited to, tax returns, marshaling of assets, real estate transactions, asset and investment management, doctor appointments, case and care management, all client communications, including communications with family members, counsel, accountants, care managers, trust beneficiaries, intestate heirs, financial planners/advisors, banking institutions, facility administrators, doctors, dentists, and all other professional communications.	\$195/hour
<u>Associated Fiduciary Rate:</u> Only on a necessary basis.	\$165/hour
<u>Bookkeeping:</u> Reconciling accounts, monthly reports, accounts receivable, accounts payable and preparation of spreadsheets as necessary.	\$125/hour
<u>Administration Rate:</u> Tasks include, but are not limited to, document organization, scanning, communications with vendors and clients, drafting correspondence and high-level assistance to licensed professional fiduciary.	\$155/hour
<u>In-House Accountings:</u> Preparation of court or non-court supervised Accountings Under the California Rules of Court.	\$175/hour
<u>Court Appearances/Mediation/Consulting:</u>	\$250/hour

Note: All conservatorship fees are subject to Court approval under the California Probate Code and/or Local Rules of Court. All statutory probate fees are set forth by statute.

Note: Trustee's fees may be paid from trust-titled assets by fiduciary, unless said trust is under specific court order mandating the Court's approval before payment.

Complicated trusts that require an extensive amount of management may be negotiated at up to 1% of the market value of assets being managed annually.

In some instances, fees for sale of real property are based on 1% of the sales price of the subject property, excluding property sold while in probate or under conservatorship.