

***Rita Kiriaki, California Licensed Professional Fiduciary &  
National Certified Guardian. License #1080  
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**SCHEDULE OF FIDUCIARY FEES  
(EFFECTIVE January 1<sup>st</sup>, 2025)**

**DESCRIPTION**

**FEE**

**Professional Fiduciary Rate:**

**\$175/hr.**

A California-licensed professional fiduciary with National Certified Guardian Certification offers services as a Trustee, Conservator, Estate Administrator, Executor, and Agent Under Power of Attorney. The services include:

- Communicating with clients via phone, text, Zoom, and email
- Managing and overseeing investments
- Conducting budget analysis
- Hiring care managers and caregivers
- Overseeing real estate transactions
- Providing client communication and assistance with various tasks
- Supplying the Certified Public Accountant with the necessary tax documents for client tax preparation.

**Sales or Transfer of Real Estate Property:**

**1%**

**Preparation of Accounting:**

**\$150/hr.**

Preparation of Court and non-court accounting. Reconciliation of investment accounts, recording deposits and expenses in Money Market accounts, calculating securities gains and losses, and entering asset values into the accounting system.

**Administration Rate:**

**\$110/hr.**

Bookkeeping, mail handling, invoicing, bill payment processing, document organization, and clerical work.

**Court Appearances:**

**\$180/hr.**

Attending hearings and testifying in Court.

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**Note: All conservatorship fees are subject to Court approval under the California Probate Code and/or the Local Rules of Court. In addition, all extraordinary estate representative fees in probates are subject to Court approval. In addition, regular statutory fees in probate will not be paid until ordered by the Court.**

**Note: Trustee's fees may be paid from trust-titled assets by a fiduciary unless said trust is under a specific court order mandating the Court's approval before payment. Complicated trusts that require extensive management may be negotiated at a rate of up to 1% of the market value of the assets being managed annually.**