



CALDERON
FIDUCIARY OFFICE & TRUSTEE

Fee Schedule effective January 1, 2025

Power of Attorney/Trust Administration

Gross Market Value	Applicable Fee
First \$3 Million	1.00%
Next \$3 Million	0.75%
Next \$4 Million	0.50%
\$10 Million and Above	0.35%
(Minimum Annual Fee \$50,000)	

Estate Settlement and/or Terminating Trust

	Applicable Fee
First \$3 Million	2.00%
Next \$3 Million	1.50%
Next \$4 Million	1.00%
\$10 Million and Above	0.50%
(Minimum Fee \$50,000)	

Example Calculation for Blended Quarterly Fee for a \$10MM Estate

Gross Market Value	Applicable Fee	Annualized Fee Calculation	Quarterly Fee Calculation
\$3,000,000	1.00%	\$30,000	\$7,500
\$3,000,000	0.75%	\$22,500	\$5,625
\$4,000,000	0.50%	\$20,000	\$5,000
\$10,000,000			
Total Quarterly Fee		\$18,125	

Fee Schedule Terms

1. Fees for our services are assessed quarterly and are calculated in arrears based on the previous quarter-end gross market value of the estate.
2. Value of real estate holdings (including owner/grantor/beneficiary occupied real estate) owned by the trust under administration are included in the fee calculation.
3. For terminating trusts, real estate assets are assessed an additional 1% fee in consideration for the extraordinary time and effort involved to prepare the real estate for sale.
4. In the event of litigation with beneficiaries of other parties, CFOandT reserves the right to retain outside counsel to represent the trust. These extraordinary costs will be borne by the trust itself. Additionally, should such litigation arise, a fee of \$350 per hour will be assessed for the services of CFOndT.
5. Additional services may be provided upon prior agreement.