

Aspen Grove Fiduciary Services, LLC Fee Schedule (Revised December 26th, 2023)

**Licensed Fiduciary\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_160 per hour**

Make all significant financial & care coordination decisions, court testimony, communication with client, families, attorneys & all parties involved in the client’s financial & physical well-being. Directly supervises the administration of conservatorship & trusts, review, approve & pay all debts & expenses, review & preparation of annual reports & accountings, management of estate administration & plans, provides direction to case management for care coordination & patient advocacy. Secure & recover personal property & assets, banking & investment management, account reconciliation, court accountings & bond analysis.

**Licensed Estate Administrator/Estate Administrator $155/130 per hour**

Provides court testimony, communicates with client, families, attorneys & all interested parties involved in financial & physical well-being. Administration of guardianship/conservatorship & trusts, review debts and expenses, preparing and processing debt payments, drafting & preparation of annual reports & accountings, Securing & recovering property & assets, banking & investment management, account reconciliation, court accountings & bond analysis. All duties & responsibilities of the estate administrator are performed under the direct supervision of the licensed principal fiduciary.

**Asset Management\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_$120/hour**

Inventory, digital imagery, secure property, obtain appraisals (when necessary), supervision of maintenance of property, client relocation coordination, management of detailed property records, coordination of services pertaining to property & preparation for sale property.

**Case Management, Care Coordination & Patient Advocacy\_\_\_\_\_\_\_\_\_\_$140/hour**

Registered nurse clinical coordinator, under direct supervision of the principal fiduciary, manages all aspects of activities required for regulatory compliance with ARS 14-5312 & ACJA 7-202 (J) (3). Through routine client visits ,case management assesses the physical, environmental & health status of the client/ward/protected person, review of medical records, medications, management of client’s medical care, scheduling appointments with primary care and specialists, keeping track of health care services, assisting with the referral process in attaining other ancillary services like home care, medical equipment, medical supplies and outpatient services, monitor medications, communication with providers, completion of documents, locating community resources to help with any unmet needs, schedule medical transportation, maintains & protects health records in compliance with HIPAA requirements, & placement/housing coordination.

**Initial Case Set Up Fee\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_$500.00**

This is a one-time set-up fee for case establishment. Initial investigation, intake, research, conferences, professional consultations, court sessions & meetings with third party agencies, and similar/related activities required by ACJA 7-202 (J) (1) (a) and (d)

**Non-Court Appointed Care Management & Patient Advocacy \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_$90/hour**

Private sector citizens needing assistance with care coordination & patient advocacy may consider hiring a professional advocate. Aspen Grove will assist you with every aspect of your medical care, from scheduling appointments with your primary care and specialists, keeping track of your health care services, assisting you in understanding your diagnosis and treatment options, assisting with the referral process in attaining other ancillary services like home care, medical equipment, medical supplies and outpatient services, keep track of your medications, make certain your doctors are speaking to each other or at the very least fully informed of treatment being provided, filling out complex forms or documents, follow up with you after medical services to review any additional needs, support in locating community resources to help with any unmet needs, advocate for you to get the highest quality care, efficiently and on time, and make arrangements for transportation to access your health care services

**Records & Administrative Management \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_$90.00\_**

Critical supportive services not requiring advanced credentials or licensure, uncomplicated & does not pose significant inherent risk or potential for liability.