

Dalton Fiduciary Services – Pricing Chart *Effective September 18, 2025*

Trust Administration Fees

Fees are based on the value of the trust and calculated annually unless otherwise noted.

Trust Value	Fee Structure
Less than \$1,000,000	\$195 per hour
\$1,000,000 – \$5,000,000	1% of trust value, annualized
\$5,000,000 – \$10,000,000	0.75% of trust value, annualized
\$10,000,000 – \$15,000,000	0.50% of trust value, annualized
\$15,000,000+	0.25% of trust value, annualized

Professional Fiduciary Services

Hourly rates apply to fiduciary services outside of trust administration.

Service	Rate
Standard Hourly Rate	\$195 – \$225 per hour
Consulting Services	\$250 per hour

Probate Administration Fees

Fees payable to the Professional Fiduciary as Personal Representative under Probate Code §10800.

Estate Value	Fee Rate
First \$100,000	4%
Next \$100,000	3%
Next \$800,000	2%
Next \$9,000,000	1%
Next \$15,000,000	0.5%
Above \$25,000,000	Court discretion

Extraordinary Services

Services such as tax issues, real property sales, or litigation: starting at **\$215 per hour** (court approval required).

Additional Notes

- Billing occurs in 1/10th of an hour increments.
 - Travel time billed one-way at standard hourly rates.
 - Fees billed and paid monthly, except court-mandated structures (e.g., Probate).
 - Client is responsible for all direct costs and expenses incurred on their behalf.
 - Fees are subject to change with 30 days' notice.
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Dalton Fiduciary Services

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