



Tim Eckardt, CLPF #1294
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**FEE SCHEDULE FOR SERVICES RENDERED
as of January 2025**

Case Manager Compensation: \$120.00 per hour

- ✧ Coordinate & facilitate home placement and/or engagement of care providers
- ✧ Oversee personal care & health care needs
- ✧ Provide property management
- ✧ Assist with bill paying

Trust Administration (Initial/Successor Trustee) & Powers of Attorney (General, Limited, Springing, Durable): \$120.00 per hour

- ✧ Take control of and preserve trust property
- ✧ Invest assets prudently
- ✧ Provide record-keeping and accounting services
- ✧ Distributes income
- ✧ When provided by trust instrument, exercises discretionary power to pay principal to beneficiary if funds are needed
- ✧ File tax returns
- ✧ Manage real estate
- ✧ Distributes trust assets when trust terminates

Conservatorships (Limited, Person, Estate, Both), Court-supervised Personal Representative

- ✧ Marshal and manage assets, Inventory & Appraisal
- ✧ Monitor environment
- ✧ Supervise medical care
- ✧ Report to the court
- ✧ Provide bill paying & record keeping services
- ✧ File tax returns
- ✧ Provide property & personal care management

Court-supervised accounts are paid upon Court approval or in periodic payments pursuant to the California Probate Code (See schedule below). All other matters are paid from client funds upon invoice.

Percentage structure pursuant to California Probate Code §10800 & 10810

- **First \$100,000:** 4% of the estate's value
- **Next \$100,000:** 3% of the estate's value
- **Next \$800,000:** 2% of the estate's value
- **Next \$9 million:** 1% of the estate's value
- **Next \$15 million:** 0.5% of the estate's value
- **Over \$25 million:** A reasonable amount determined by the court

Compensation for extraordinary services:

\$120.00 per hour

- ✧ Additional compensation is charged for extraordinary efforts required to marshal assets, obtain loans, sell real estate, distribute personal property, mediate family disputes and litigate on behalf of the client.

Fees are charged on a 6 minute billing model.

Services contracted on behalf of the client are paid directly from client funds.

Legal Disclaimer: Tim Eckardt is not an attorney or tax accountant. In situations where an attorney is required, I may retain legal services on behalf of the client and such services will be paid directly from client funds. Should you have legal questions, please contact your preferred attorney or tax specialist.