

Fee Schedule 2024

Barry VanderKelen, Licensed Fiduciary #785, Base Rate	\$180.00 per hour								
Complex services: Review of accountings, tax returns, asset investigations. Real Estate transactions (i.e., sales, purchases, loans, routine evictions). Asset and Investment management and decision making. Tax matters.	\$180.00 per hour								
Expert Witness services or court testimony. Other highly complex issues that require special skills or risks. Litigation or settlement discussions and other contested legal matters.	\$250.00 per hour								
Accountings, Insurance and Payroll Coordination	\$100.00 per hour								
Administrative services (copying, mailing, online shopping), Routine bookkeeping services, Client receivable, payables.	\$60.00 per hour								
Services are billed in 10-minute increments.									
Central Coast Trust is not a law firm. Legal services are paid to attorneys directly from client funds, with court approval, if necessary.									
Fees are invoiced monthly and paid from client funds.									
Alternate fee schedules, including percentage fees, may be applied in lieu of hourly rate.									
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Asset Value</th> <th style="text-align: left;">Fee</th> </tr> </thead> <tbody> <tr> <td>\$100,000-\$4,999,999</td> <td>.65% annualized</td> </tr> <tr> <td>\$5,000,000-\$9,999,999</td> <td>.5% annualized</td> </tr> <tr> <td>\$10,000,000 +</td> <td>.25% annualized</td> </tr> </tbody> </table>	Asset Value	Fee	\$100,000-\$4,999,999	.65% annualized	\$5,000,000-\$9,999,999	.5% annualized	\$10,000,000 +	.25% annualized	
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\$100,000-\$4,999,999	.65% annualized								
\$5,000,000-\$9,999,999	.5% annualized								
\$10,000,000 +	.25% annualized								
Such fees will be paid monthly from client funds.									
All fees of Central Coast Trust are negotiable, and this fee schedule is subject to change with reasonable and required notice.									

January 2024