



VALLEY TRUST SERVICES - PROFESSIONAL FIDUCIARY FEE RANGE

At Valley Trust Services, we charge an hourly fee for some cases and we charge a fee based on the market value of assets for other cases. For 2023 our published fee schedules will apply to most clients. Some clients' fees could vary from Valley Trust's published fee schedule if the case is subject to Court Approval. Each County has set maximum fees allowed so under these circumstances the rates we charge may differ from Valley Trust's published fee schedules.

Trustee, Agent Under Power of Attorney/Agent Healthcare Directive**

Professional Fiduciary hourly rate \$225.00 / 2-hour monthly minimum

Conservatorship of the Person and/or Estate; Trust Under Court Supervision

(Subject to court approval)

Professional Fiduciary hourly rate range: \$145.00 to \$175.00 per hour / 2-hour monthly minimum

Trustee Fees based on a Percentage**

Professional Fiduciary fee range for usual and customary duties/services as Trustee are computed as follows:

Annual Percentage Fees:

1% on the First \$2MM

.65% on Next \$2MM

.45% on Next \$2MM

.25% on balance of account

Sale/Purchase of Real Estate:

1/2% on Purchase/Sale Price on Residential Real Estate 1% on Purchase/Sale Price on Commercial Real Estate

Probate Administration Fees

Fees payable to the Professional Fiduciary as the Personal Representative for customary services are authorized under Probate Code §10800 and, pursuant to Probate Code §10800 are computed on a fee base comprised of gross assets, plus receipts and gains, less losses as follows:

4% of the First \$100,000

3% of the next \$100,000

2% of the next \$800,000

1% of the next \$9,000,000

0.5% of the next \$15,000,000 Court discretion after \$25,000,000

In addition to statutory fees, pursuant to Probate Code §10801, extraordinary fees can be requested for services such as, but not limited to, tax issues, real property sales and litigation. Though fees for extraordinary services are subject to court approval, extraordinary services are charged at the following hourly rates:

Professional Fiduciary hourly rate range: \$175.00 to \$225.00 per hour (Subject to Court Approval)

** Fees are subject to change with proper notice; Some clients' fees may differ from published fee schedules based on Court Approval and based on the complexity of the case. We reserve the right to prepare a custom fee schedule for those clients with unique assets, and/or with complex trust estate matters.

ROGER BOAZ, PROFESSIONAL FIDUCIARY CLPF #511

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COUNTIES WE SERVICE

Alameda, Contra Costa, Marin, Marin, Sonoma, Sacramento, San Francisco, San Joaquin, San Mateo, Santa Clara
Stanislaus, Solano

SERVICES

Trustee Services

Special Needs Trusts

Estate Settlement

Fiduciary Accounting Services

Additional Services

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