



PRICE SCHEDULE

Effective January 1st, 2026

Service	Price	Info
Professional Fiduciary Services	\$200-250	Please see below for more information. No charge for initial 30 min. consultation.
Associate Fiduciary Services	\$125	Bill pay, monthly reports, bank deposits, file management, document organization.
Successor Engagement Fee	\$1,600	Intake, document gathering and storage, analysis and assessment, onboarding.
Assets Under Management (AUM)	First \$1M: 1.25% \$1-5M: 1.0% \$5-10M: 0.75% \$10M+: Negotiable	Trustee fee alternative to hourly Professional Fiduciary Services fees. Calculated annually based on fair market value (FMV) of assets.
Probate Administration	See Info	Fees are stipulated by legal authority under Probate Codes §10800 & §10810.

Professional Fiduciary Standard Rates (\$200/hr)

Trustee/Guardian/Conservatorship/Power of Attorney	Property asset marshaling/real estate/appraisals
Accountings, court filings, budgeting, prudent financial plans	Case/care management, health care and appointments
Family/heir/beneficiary/bank/care manager communication	Accountant/attorney/financial advisor communication

Professional Fiduciary Exceptional Rates (\$250/hr)

Emergencies billed after office hours	Attending/Testifying in Court Hearings	Complex Real Estate or Tax Matters
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Probate Fees

Per Probate Codes §10800 and §10810, a Professional Fiduciary's Probate fees are typically calculated as a percentage of the total estate value, with a sliding scale that decreases as the estate value increases. There are more fees involved. For a more thorough explanation, see here: [Probate in California](#)

Other Information

- 1% of the sales price. This fee is assessed in lieu of hourly billing for all fiduciary work related to the sale. It accounts for the extraordinary legal liability and oversight required to protect trust equity during and after the escrow process.
- Billing occurs in 1/10th of an hour increments. Travel time is billed one-way at standard hourly rates.
- Fees are billed and paid monthly, excepting court-mandated fee structures (such as Probate).
- As needed, we work best with trusted experts related to our specialty. These include attorneys, CPAs, Financial Advisors, and healthcare experts. These fees are not ours and will be billed directly to the Trust, Conservatorship, Estate, or other entity involved.
- Fees subject to change with 30 days notice.
- Client is responsible for all direct costs and expenses incurred on their behalf.

