

# **Full Circle Fiduciary**

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### **PROFESSIONAL FIDUCIARY FEE RANGE SCHEDULE - 2025**

#### **PRIVATE (NON-COURT SUPERVISED) CASES**

##### Agent Under Power of Attorney/Agent Under Healthcare Directive

Professional Fiduciary hourly rate - M - F 9a-5p	\$250 per hour
After hours, evenings, weekends, and holidays	\$315 per hour

##### Other Services including Consulting, Care Management and Bill Paying/Money Management Fees by Professional Fiduciary

Professional Fiduciary hourly rate - M - F 9a-5p	\$250 per hour
After hours, evenings, weekends, and holidays	\$315 per hour
Hourly rate is billed in $\frac{1}{10}$ of an hour increments	

##### Trust Administration Fees

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

Professional Fiduciary hourly rate - M - F 9a - 5p	\$250 per hour
After hours, evenings, weekends, and holidays	\$315 per hours

#### **OR**

Up to 1% per annum for usual and customary services subject to the size of the Trust, type and complexity of assets and services provided. Additional professional fiduciary fees may be charged at our hourly rate range for unusual/extraordinary services such as, but not limited to, complex tax issues, complex real property sales, litigation, and inventory and distribution of personal property. For trusts with fair market values under \$400,000, a minimum annual fee of \$4,000 will be charged. Fair market value of assets will be determined upon date of appointment as Trustee and reassessed annually at the end of each calendar year.

#### **COURT SUPERVISED CASES**

##### Conservator of the Person, Conservator of the Estate, Trustee

Fees are based upon local court guidelines and subject to court approval.

Professional Fiduciary hourly rate range	\$175 - \$250 per hour
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##### Probate Administration Fees

Fees are based upon local court guidelines and subject to court approval.

Fees payable to the Professional Fiduciary as the Personal Representative for customary services are authorized under Probate Code §10800 based on the size of the estate. 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, Special Trustee, and litigation.

Though fees for extraordinary services are subject to court approval, extraordinary services are charged at the following hourly rate range:

Professional Fiduciary hourly rate range \$175 - \$355 per hour

Notes:

- For further information on our services and staff rates, please enquire with our office
- Rate subject to change at any time
- A one time onboarding fee of \$800 and an annual fee of \$600/year will be charged to each client for database maintenance

**Costs and Third-Party Fees:** Full Circle Fiduciary shall also be reimbursed for all reasonable costs and expenses incurred in performing his or her duties, at the direct rate of the cost of the expense incurred.

- The Hourly Rate does not apply to the fees of third-party professionals who provide services for the benefit of the Client including, but not limited to, accountants, appraisers, attorneys, bookkeepers, case managers/providers, consultants, investment advisors, property managers, realtors, tax professionals and estate organizers.
- All costs and fees for those professionals will be directly passed on to the client and paid to the Fiduciary.