



*Who's your
Guardian?*

Home Office:
570 Fifth Street
Lincoln, CA 95648
Locations in: Elk Grove & Truckee



Phone: (916) 434-1022
www.advocatefiduciary.com

PRIVATE FIDUCIARY SERVICE FEE SCHEDULE 2024

- *Private Fiduciary as Power of Attorney-Private Agreement:*
 - \$200.00 per hour private for a Licensed Private Fiduciary
 - \$170.00 per hour for Assistant Fiduciary for Case Management.
 - \$115.00 for all administrative tasks and Accounts Payable.
 - All time is billed in 6 minute increments.
 - Expenses are billed at cost.
- *Private Fiduciary as Trustee of Trust while Trustor/Settlor is alive by appointment and Private Agreement with Trustor/Settlor or by Court Order.*
 - \$200.00 per hour private for a Licensed Private Fiduciary
 - \$170.00 per hour for Assistant Fiduciary for Case Management.
 - \$115.00 for all administrative tasks and Accounts Payable.
 - All time is billed in 6 minute increments.
 - Expenses are billed at cost.
- *Private Fiduciary as Successor Trustee of Trust for distribution upon Trustor/Settlor's death:*
 - Estates from \$0.00 to \$1,500,000 will be calculated at our hourly rate as outlined in above.
 - Estate over \$1,500,001 – and up calculated at 1.5% gross value of the estate any work exceeding the minimum will be done at the hourly rate above.
 - Estates that are highly contested or beneficiaries unable to get along or cooperate and exceeds the minimum gross value will be continued to be billed to the estate at the same rate as 1 and 2 above.
- *Estates that continue after the Administration of the Main Trust:*
 - \$200.00 per hour private for a Licensed Private Fiduciary
 - \$170.00 per hour for Assistant Fiduciary for Case Management.
 - \$115.00 for all administrative tasks and Accounts Payable.
 - All time is billed in 6 minute increments.
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- Private Fiduciary as Trustee of Special Needs Trust by appointment and Private Agreement with Trustor/Settlor, Resigning Trustee or by Court Order.
 - \$200.00 per hour private for a Licensed Private Fiduciary
 - \$170.00 per hour for Assistant Fiduciary for Case Management.
 - \$115.00 for all administrative tasks and Accounts Payable.
 - All time is billed in 6 minute increments.
 - Expenses are billed at cost.
- Private Fiduciary as Executor/Administrator/Special Administrator for Probate:
 - Statutory executor fees, expense and statutory executor extraordinary fees, if applicable.
- Private Fiduciary as Conservator of the Person, Estate or Person and Estate:
 - \$200.00 per hour private for a Licensed Private Fiduciary
 - \$170.00 per hour for Assistant Fiduciary for Case Management.
 - \$115.00 for all administrative tasks and Accounts Payable.
 - All time is billed in 6 minute increments.
 - Expenses are billed at cost.
- Dual Hourly Fees (Circumstances requiring two people from our office to bill for the same task at regular hourly rate)
 - Estate Inventory requires two people for accuracy and transparency for valuables.
 - Contentious / Unsafe Environment / Threats of physical harm at any time during the duration of duties by Licensed Fiduciary as appointed or required by the courts.
- Minimum Fee
 - Monthly administrative fee of \$45.00 will be applied to all clients, for office supplies, stamps, client e-file maintenance, computer security protection of private information and operating expenses.
 - Monthly minimum charge per client is equivalent to one hour of our Licensed Private Fiduciary rate.
 - Annually the minimum charge for the management of the Estate or the Person will be 1.5% the value of the Estate or the total annual billed amount whichever is greater.



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- **Posted Fee Schedule**

- Our fee schedule is updated and posted on our website or upon request from our office. Our fees are reviewed periodically and compared to the industry standards. We want to ensure that the level of service provided is above and beyond expectations.

PROCEDURES FOR IMPLEMENTING FIDUCIARY SERVICES

- 1) Private Fiduciary receives and reviews Trust and/or all other Estate Planning documentation and agrees to serve as Trustee, Agent or Attorney-in-Fact.
- 2) Client or legal representative executes Private Fiduciary Services Agreement.
- 3) Private Fiduciary agrees to Court appointment as Conservator or the Person and/or Estate.
- 4) Private Fiduciary establishes client file, copies/scans documentation and sets up accounting system.
- 5) Client or legal representative executes all necessary documents authorizing Private Fiduciary to manage client's assets and delivers originals to Advocate Fiduciary Services.
- 6) Client or legal representative immediately delivers to Private Fiduciary upon execution of the Private Fiduciary Services Agreement, information regarding all the assets under private fiduciary management.

FUTURE SERVICES (Estate Planning)

Advocate Fiduciary Services offers a future services agreement accepting a client's nomination for Advocate Fiduciary Services to act as a future Attorney-in-Fact under a Power of Attorney, Agent under an Advanced Health Care Directive, Successor Trustee for Trusts and Executor under a Will.



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FUTURE SERVICES PROCEDURES

Procedures for Advocate Fiduciary Services to accept a client's nomination as Attorney-in-Fact under a Power of Attorney, Agent under an Advanced Health Care Directive, Successor Trustee for Trusts and Executor under a Will.

1. One hour in office consultation to review Will/Trust wording and meet with fiduciary, and execute future services agreement.
2. Provide client with a Legacy Ledger and review the content.
3. Client to provide copies of documents for file set up and scanning of documents;
4. Provide client with contact and emergency contact information;
5. Annual Update of client's information.

CALIFORNIA INSURANCE HOMEOWNERS AND AUTO

1. Background

The Parties acknowledge the challenging landscape of insurance coverage in California, particularly in the face of escalating fire seasons. The increasing difficulty in obtaining affordable coverage, coupled with major insurance companies withdrawing from the state, has prompted the need for comprehensive insurance solutions.

2. Homeowners Insurance Provisions

2.1 Coverage Challenges:

The Parties recognize the rising costs of homeowners' insurance in fire-prone zones, experiencing an exponential increase. Major insurance companies withdrawing from California further exacerbates the situation.

2.2 Trustee Liability:

To secure homeowners' insurance, the Trustee must be personally named, and the Trust is added as an additional insured. Consequently, all properties, regardless of Trustee involvement, are subject to past claims on all properties associated with the Trustee, potentially leading to an increase in insurance costs.



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2.3 Cost Management:

Provider undertakes the duty to secure homeowners' insurance at the best possible price. However, it is expressly understood that the Trustee cannot be held liable for any increase in insurance costs arising from past claims on all properties associated with the Trustee.

2.4 Beneficiary Initiative:

If a beneficiary wishes to explore cost savings by insuring the property under their name, the Trustee is open to collaborating with the beneficiary in this regard.

3. Vehicle Insurance Provisions:

3.1 Parallel Challenges:

Similar to homeowners' insurance, vehicle insurance in California faces challenges due to the evolving insurance landscape and external factors, such as increased fire risk.

3.2 Trustee Non-Liability:

In securing vehicle insurance, the Trustee's liability remains analogous to homeowners' insurance. The Trustee cannot be held responsible for any increase in auto insurance costs resulting from external factors or past claims on other insurance policies.

4. General Provisions

4.1 Best Efforts:

Provider agrees to exert its best efforts to secure insurance coverage for the Trustee at the most favorable terms available in the market.

4.2 Indemnification:

The Trustee shall indemnify and hold harmless the Provider against any claims, liabilities, or expenses arising from external factors impacting insurance costs, including but not limited to fire risks and past claims on properties or vehicle insurance.



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5. Conclusion

This Agreement reflects the understanding between the Parties regarding the challenges and responsibilities associated with securing homeowners' and vehicle insurance in California. By signing below, the Parties acknowledge and agree to the terms outlined herein.