



*Who's your
Guardian?*

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Private Fiduciary Fee SCHEDULE 2026

Initial Consultation

- **\$150.00 per hour.** Time is billed in 6-minute increments.
- **\$350.00 Intake Fee:** Review of estate planning documents, Preparation of intake questionnaire, Intake meeting, and Emergency contact cards
- This cost will be deducted from future services once Advocate Fiduciary Services is engaged and services are needed.

Standard Hourly Rates (Private Agreement / Appointment / Court Order)

Role / Work Type	Rate
Licensed Private Fiduciary	\$220.00/hr
Assistant Fiduciary (Case Management)	\$180.00/hr
Administrative Tasks & Accounts Payable	\$120.00/hr

Services and How Fees Are Calculated

- **Power of Attorney (Agent/Attorney-in-Fact):** Billed hourly based on staff involved.
- **Trustee while Trustor/Settlor is living:** Billed hourly based on staff involved.
- **Conservatorship (Person, Estate, or Person and Estate):** Billed hourly based on staff involved.
- **Trustee of a Special Needs Trust:** Billed hourly based on staff involved.
- **Estates that continue after administration of the main trust:** Billed hourly based on staff involved.
- **Successor Trustee (Distribution after death):** Estates \$0-\$1,500,000 billed hourly. Estates \$1,500,001+ calculated at 1.5% of gross estate value (minimum); work beyond the minimum billed hourly. Highly contested matters may continue to be billed at the hourly rates above.
- **Probate (Executor/Administrator/Special Administrator):** Statutory executor fees and expenses, plus statutory extraordinary fees if applicable.

Billing, Minimums, and Expenses

- All time is billed in 6-minute increments.
- Expenses are billed at cost.
- Dual hourly fees may apply when two staff members are required for the same task (e.g., estate inventory; contentious/unsafe environments or threats of physical harm).
- Monthly administrative fee: \$50.00 (office supplies, postage, client e-file maintenance, computer security, and operating expenses).
- Monthly minimum charge per client is equivalent to one hour of the Licensed Private Fiduciary rate.
- Annual minimum charge for management of the estate or the person is 1.5% of the estate value OR the total annual billed amount, whichever is greater.

Annual Update Meeting

- One free 30-minute annual update meeting is included.
- Any time beyond 30 minutes is billed at our regular hourly rates based on staff involved.

Estate Expenses When Funds Are Not Yet Available

- If an estate cannot afford to pay necessary expenses while awaiting funds, we will first request that beneficiaries or intended recipients of distributions pay those expenses.
- If no one agrees to pay the expenses, Advocate Fiduciary Services may, when permitted and/or approved as required, advance the expenses as a loan to the estate at 10% interest.
- All advances, plus interest, must be repaid in full once funds are available.