

O'Brien Fiduciary Services Fee Schedule

<u>Service Provided</u>	<u>Hourly Fee</u>
Fiduciary Services hourly rate range (standard/complex)	\$175.00 - \$200.00
Office & Account Manager hourly rate	\$100.00

Fees, Costs and Billing

- Services are billed in 1/10th of an hour (6 minute) increments. All time expended is billed including, for example, phone call discussions, email or text communications, conference calls, meetings, research and investigation, analysis, payment of bills, reconciliation of accounts, one-way travel and all other activities associated with the case. Long distance travel (over 1 hour) is billed at Fiduciary's discretion.
 - Direct and out-of-pocket costs and expenses incurred shall be itemized and charged back for reimbursement. These can include parking, tolls, court costs, extraordinary postage, delivery fees, extraordinary reproduction services and other costs associated with administering the trust/estate.
 - Professional services such as accounting, tax preparation, investment management, care management and legal services are contracted with sources outside of O'Brien Fiduciary Services and are paid for with trust/estate funds.
 - Fees equaling 1% of the gross contract price may be taken in lieu of any trustee fees for work associated with the sale of real property.
 - Fees are billed monthly and paid from client funds. Decedent estate and conservatorship fees are paid upon court approval. Conservatorships will be billed for periodic payments on account as determined by the court based upon case circumstances and will be paid by client funds.
 - Fees are subject to change with 30 days' notice.
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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 above hourly rates.

Trustee Fees

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

- Professional fees as stated above

OR

- 0.75% - 1.0% 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 hourly rates as stated above for unusual/extraordinary services such as, but not limited to, complex tax issues, complex real property sales and litigation.
