

# REDWOOD FIDUCIARY SERVICES

## SCHEDULE OF FEES

Trustee Services	The greater of either: <ul style="list-style-type: none"> <li>• 1% of value of assets under management per annum, or</li> <li>• \$200-\$240 per hour for time spent billed hourly</li> </ul>
Agent under Power of Attorney for Financial Management, Healthcare Directive or Personal Care Management	<ul style="list-style-type: none"> <li>• \$200-\$240 per hour</li> </ul>
Conservator of Person and/or Estate and Trusts Under Court Supervision	<ul style="list-style-type: none"> <li>• \$160 - \$200 per hour (varies by County, subject to Court approval)</li> </ul>
Probate Administration Services authorized under Probate Code §10800 are computed on a fee base comprised of gross assets, plus receipts and gains, less losses	<ul style="list-style-type: none"> <li>• 4% of the first \$100,000</li> <li>• 3% of the next \$100,000</li> <li>• 2% of the next \$800,000</li> <li>• 1% of the next \$9,000,000</li> <li>• 0.5% of the next \$15,000,000</li> <li>• Court Discretion above \$25,000,000</li> </ul>
In addition to statutory fees, pursuant to Probate Code §10801, extraordinary fees may be required for services such as, but not limited to, tax issues, real property sales and litigation. Extraordinary services are charged at the following hourly rates:	<ul style="list-style-type: none"> <li>• \$200 - \$240 per hour</li> </ul>
Sale/Purchase of Real Estate	The greater of either: <ul style="list-style-type: none"> <li>• 1% of purchase/sale price, or</li> <li>• \$200-\$240 per hour for time spent billed hourly</li> </ul>

- These charges are effective January 1, 2024, and may be adjusted periodically with 30 days' notice.
- Fees are billed for any action taken for the client's benefit, including, but not limited to client visits, travel, telephone calls, email, letters, documentation review, preparation of documents, deposition and court preparation and attendance, consultation and related administrative support.
- Hourly rates are billed to 1/10<sup>th</sup> of an hour (6 minute) increment.
- Reimbursement for fees paid to other third-party vendors including attorneys, real estate brokers, accountants, tax preparers, real estate management agents and others are additional.
- Expenses for special postage, travel and parking are billed at cost. Mileage is billed at standard IRS approved rates.
- Once services have commenced, there is a minimum quarterly billing commitment of \$200.
- Any expedited service request after regular business hours, weekends or holidays are billed at time and a half.
- Some clients' fees may differ from published fee schedules based on court approval and based on individual complexity. We reserve the right to prepare a custom fee schedule for those clients with unique assets, and/or complex trust estate matters.
- Unless court approval is required, fees are invoiced monthly and payable within 10 days generally from client funds. Invoices not paid within 30 days will accrue interest computed at 1% per month. For Conservatorships, invoices will be paid 40% prior to court approval (Rule 11 V (4)). If the court previously granted periodic payments on account of conservatorship fees pursuant to Probate Code § 2643, these periodic payments will instead be collected.