

## Pais Montgomery Fiduciary Fee Range Schedule

*Effective January 1, 2023*

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

Professional Fiduciary hourly rate range      \$200 - \$300 per hour  
 Support Staff hourly rate range                 \$100 - \$175 per hour

### Guardianship/Conservatorship of the Person

(Guardian/Conservator fees are subject to court approval)

Professional Fiduciary hourly rate range      \$200 - \$300 per hour  
 Support Staff hourly rate range                 \$100 - \$175 per hour

### Guardianship/Conservatorship of the Estate

(Guardian/Conservator fees are subject to court approval)

Professional Fiduciary hourly rate range      \$200 - \$300 per hour  
 Support Staff hourly rate range                 \$100 - \$175 per hour

### 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 following hourly rates:

Professional Fiduciary hourly rate range      \$200 - \$400 per hour

### Trustee Fees

Professional Fiduciary trustee fees range for usual and customary duties/services as Trustee are computed as a percentage of Gross Asset Value from 1.9% - 0.5% per annum for usual and customary services subject to the size of the Trust, type and complexity of assets and services to provided. Additional professional fiduciary fees may be charged at hourly rates ranging from \$250 - \$400 per hour for unusual/extraordinary services such as, but not limited to, complex tax issues, complex real property sales and litigation.

For some court supervised cases:

Professional Fiduciary hourly rate range      \$200 - \$400 per hour  
 Support Staff hourly rate range                 \$100 - \$175 per hour