McCue Fiduciary Services

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FEE SCHEDULE FOR FIDUCIARY WORK

January 2025

FIDUCIARY WORK: includes billing for the fiduciaries' time for Conservatorships both of the Estate and/or the Person, Power of Attorney for finances and/or healthcare, and extraordinary time on Decedents' Estates and Trust Administrations. The hourly **Fiduciary Fee** is $225.00. We generally review our hourly rates annually and, if appropriate, adjust them effective January 1 of each year. Billing is done in six (6) minute increments on an itemized, chronologically dated time summary so that one tenth of one hour, or .1, equals 6 minutes, .2=12 minutes, .3= 18 minutes, etc., generating a cost to the Estate or Trust of $22.50 per unit of time.
The hourly **Blended Fee** reflects logging of income, preparing deposits, check writing and the reconciliation of financial statements, storage, postage, and data entry and is set at $120.00 per hour, billed at quarter of an hour intervals, or .25= 15 minutes.

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PROBATE ESTATES: The California Probate Law establishes a statutory fee, or a court or statute-set fee for the general routine actions of the fiduciary in executing the administration of a probate estate.

- 4% of the first $100,000.00
- 3% of the next $100,000.00
- 2% of the next $800,000.00
- 1% of the next $9,000,000.00

For those administrative actions which fall outside the routine fiduciary services covered by the statutory fee there are extraordinary fees charged at $225.00 per hour according to the Local Rules of Court. If extraordinary fees are requested to be paid to the fiduciary, an itemized chronologically dated time summary will be provided to show why statutory fees did not cover all fiduciary fees.

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TRUST ADMINISTRATION: Each Trust is handled according to the required duties of liabilities as delineated in the Trust Instrument. Following these duties, the Trustee manages the assets and retains other professional contractors and managers as required. Generally, the Trust Instrument governs the payment of Trustee fees as "Fair and Reasonable Compensation". The fee of an appointed, licensed fiduciary from McCue Fiduciary Services as Trustee is set at the Fiduciary hourly fee of $225.00 and the Blended hourly fee of 120.00.

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