



# MARSHALL FIDUCIARY SERVICES



## SCHEDULE OF FIDUCIARY FEES

Effective January 1, 2018

SERVICES PROVIDED BY	FEE
<b>Russ Marshall</b> , National Master Guardian*, Fiduciary License #196, Base rate	\$250.00 per hour
Complex services: Review of accountings, tax returns, asset investigations. Real Estate transactions (ie: sales, purchases loans, routine evictions) Asset and Investment management and decision making, Tax matters	\$300.00 per hour
Expert Witness services or court testimony. Highly complex issues that require	\$350.00 per hour
<b>Ben Hunter</b> , Asset Management - Base rate	\$155.00 per hour
Tax and Accounting Management and Coordination. Brokerage Account reconciliation. Complex Accounting preparation coordination	\$175.00 per hour
Investment Performance Review and Research	\$210.00 per hour
<b>Sarah Benson</b> , Case Management. Medical Care coordination, Housing, Benefits applications and coordination, Contract client bill paying services	\$140.00 per hour
Personal assistance, shopping with client, routine companion services	\$ 95.00 per hour
Shopping on behalf of client, errands (not with client)	\$ 45.00 per hour
<b>Natasha Martin</b> , Account Management, Account Research, Special Projects including simple accounting preparation	\$ 95.00 per hour
Client receivables/payables	\$ 70.00 per hour
Ordinary administrative services (copying, mailing, online shopping)	\$ 45.00 per hour
<b>Brittney Wiggins</b> , Account Administrator - Client receivables/payables	\$ 70.00 per hour
Ordinary administrative services (copying, mailing, online shopping)	\$ 45.00 per hour
Special support projects	\$ 95.00 per hour
<b>Monthly Base Fee</b> , Specific services included: Accounts receivable, collect routine income and make bank deposits Routine accounts payable, includes bill paying and disbursements Reconcile routine main checking account, print monthly reports Routine mileage, Regular Postage, Fax and Routine copy charges	\$400.00 per month \$250 or \$150 will be charged depending on estate value or complexity
<b>Transaction Fee</b> - Sale, purchase or refinance of real property. At the Fiduciary's discretion, (but not in Santa Clara County Court supervised conservatorship cases) the percentage fee may be charged in lieu of hourly fees associated with the transaction. In some cases, the hourly fees may be billed and paid up until the date of the close of escrow. In such cases, a credit for all hourly fees that have been paid will be issued and the percentage fee will be billed and paid.	1% of transaction

## Conservatorship Fees

Conservator base rate - <b>Santa Clara County Local Rule 11 U. (4)(a)</b> This rate is in excess of the guidelines due to extraordinary qualifications and experience. See below for description of National Master Guardian.*	\$185.00 per hour
Asset Management - Base rate <b>Santa Clara County Local Rule 11 U. (4)(a)</b>	\$140.00 per hour
Conservatorship Case Manager fees pursuant to <b>Santa Clara County Local Rule 11</b>	\$100.00 per hour
Non routine account services, Insurance and Payroll Coordination	\$ 70.00 per hour
Client receivables/payables <b>Rule 11 U. (4)(c)</b>	\$ 55.00 per hour
Ordinary administrative services (copying, mailing, online shopping) <b>Rule 11 U.</b>	\$ 40.00 per hour
Client clerical support projects <b>Rule 11 U. (4)(c)</b>	\$ 35.00 per hour

### General Notes:

Most accountings and tax returns are prepared by contractors outside of Marshall Fiduciary Services and are paid directly from client funds.
Marshall Fiduciary Services is not a law office. Legal services are paid to attorneys directly from client funds, with court approval, if required.
Fees are invoiced monthly and paid from client funds. Fees paid from decedent estates or Conservatorship funds are only paid upon court approval. Conservatorship invoices will be paid 40% prior to court approval ( <b>Rule 11 U. (3)(c)</b> ). If the court previously granted periodic payments on account of conservatorship fees pursuant to Probate Code Section 2643, those periodic payments or 40% of each invoice, whichever is higher, will be collected.
Alternate fee schedules, including percentage fees, may be negotiated on high balance trusts (in excess of \$1,000,000 asset value). Such fees will be paid monthly from client funds.
SSI or Medi-Cal recipients with Special Needs Trust balance under \$25,000.00 are provided all services at a 30% discount.
All fees of Marshall Fiduciary Services are negotiable and this fee schedule is subject to change with reasonable and required notice.

**\* National Master Guardian.** Russ Marshall is certified by the Center for Guardianship Certification as a National Master Guardian. To achieve the National Master Guardian designation one must make a satisfactory showing of competency in guardianship by successfully completing an examination administered by The Center for Guardianship Certification. Russ qualified as a National Master Guardian candidate as having a degree from an accredited college or university with thirty two years of full-time professional guardianship experience. The examination is a comprehensive test consisting of a multiple-choice section administered in a three-hour morning session and an essay section administered in a three-hour afternoon session. The exam assesses the candidate's knowledge of best practices in guardianship of the person and estate within the following categories of knowledge relative to guardianship:

- Professional business practice issues including ethical standards conflict of interest, quality assurance, confidentiality and fees;
- Guardianship planning process including knowledge of person centered planning, dealing with difficult clients, family dynamics, abuse;
- Professional role including concepts of decision making, informed consent, capacity issues and least restrictive alternatives;
- Courts and legal processes, including compliance, authority, due process, procedures and laws;
- Personal Management, guardianship plan, residential options, oversight, functional assessments, visits, knowledge of resources;
- Financial management and accountability, investing and protecting assets, personal and real property management, public benefits;
- Medical, end of life and complex issues, DNR, AHCD, special medical decision making.