

2026 Fee Schedule

PROFESSIONALLY LICENSED, PERSONALLY COMMITTED



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Scope of Work

The fiduciary is appointed as an individual to act in legal capacities such as Trustee, Attorney-In-Fact Power of Attorney for Healthcare & Finances, Administrator of the Estate, and as a Federal Fiduciary. As the Principal, the fiduciary may serve as a consultant, provide case management services, and perform ancillary duties.

Fees For Services

The initial 30-minute consultation is complimentary whether by phone or in person. Time and services requested outside the first consultation, is billed subject to the hourly rates outlined below:

1. On-boarding

The fiduciary charges a **\$500 non-refundable** Successor Trustee Nomination fee. This fee covers reviewing Trust documents, communications, and establishing initial intake working files when named as a Successor Trustee in estate planning documents. An invoice is generated after estate planning documents are received.

When services begin, fees will be billed at an hourly rate, or, a percentage of assets under management by the fiduciary, if in capacity as a professional trustee.

2. Hourly

The fiduciary bills at **\$175** per hour for services that may be requested by you, or that may be needed to effectively assist or support you. These duties can include, but are not limited to: meetings, telephone conferences, reviewing & responding to emails and other communications; file review and preparation of data for reports, outlines, and proposals; performing forensic financials, document drafting, creating summaries, performing core project tasks, travel time, researching & collecting data, problem solving, and other ancillary duties relevant to the case; essentially actions effectively needed to assist you. Travel time is billable as it is time away from the desk & billable case time.

Time Units

Time is billed in units of 0.1 hours; which is six-minute increments. Minimum time charge for all tasks or financial transactions is six minutes.

Fees For Services

Invoicing

Services are itemized and invoiced monthly or quarterly, or depending on the activity level of the case; they include the date, activity performed and time spent. Please present questions within 14 days of submission of invoice; open communication and transparency are respectfully provided.

Retainer

A 10-hour retainer may be requested for cases where assets are not yet managed by the fiduciary; the retainer will be applied to billable time, and reflected on invoices. A request for replenishing the retainer will occur as the retainer depletes.

Case Management: For The Person – Of The Person

By hearing concerns, identifying needs, a personalized approach and action plan can be mapped. This includes, yet not limited to: medical advocacy, AHCD, insurance monitoring, managing supportive services during a decline in health, help in building vital connections to resources, assisting in organizing documents; assisting in preparation for tax appointments; forensic financials, core relevancy tasks. Should services be needed For The Person – Of The Person, separate of, or in advance of, Trust Administration, the hourly fee is \$175.

3. Costs and Reimbursements

Any out-of-pocket expenses incurred on the client's behalf will be reimbursable & payable as costs (examples include: notary services, postage, copies, supplies, mileage).

4. Fee Notifications

The fiduciary will provide written notification to interested parties 60 days in advance of rate increase. Should there be a future rate increase, it generally occurs at the anniversary date of on-boarding, or, at a new calendar year. The fiduciary is extremely cognizant of the current financial environment, and will continue to keep a close eye on the cost of services and necessary efficiencies.

Percent of Assets Under Management Fees

The fiduciary may bill a percentage of Assets Under Management annually based on the gross value of the estate under professional Trust management. The gross value of the estate is to be calculated at the beginning of each accounting period, typically the calendar year and typically paid quarterly. The percentages are charged as follows:



1%

of the first \$2,000,000

.5%

of the next \$3,000,000

.25%

of additional assets under management

Legal Representation

The fiduciary as trustee, does have legal counsel to represent the trustee; payable from the trust or client funds.



Email Communication

There are inherent risks in communicating through the use of email, including confidentiality and security issues. To the extent possible, minimal identifying information will be sent and received through email. You agree, and consent to the fiduciary communicating with you and your representatives, and other relevant parties, in the course of service, through email including transmission of documents via email.



Accounting & Records

Records and reports will be maintained in keeping in accordance with reasonable records practices. The fiduciary may keep original documents after all matters have been concluded for a period of time before destroying, and may preserve documents electronically after this time period. Records can be requested

Coordination & Permissions

In providing professional services, the fiduciary is likely to coordinate and engage with other professionals or parties. In authorizing, you understand and agree that information may be disclosed to the extent that it is necessary, relevant and appropriate in facilitating the administration, or client's behalf.

These parties may include, but are not limited to bookkeepers, accountants, tax preparers, attorneys, financial advisors, social workers or benefits coordinators, health professionals, family if authorized and proposed successor fiduciaries. Discussion & disclosure will precede taking action when applicable.

The fiduciary may be required to share confidential information with the Agent on your advanced health care directive (AHCD). The fiduciary may also disclose information to a proposed successor trustee or fiduciary. If so, you agree that we may disclose information to them to the extent that it is necessary to facilitate the coordination.



Confidentiality

Administering an estate or performing personalized case management services is a highly personal matter. For the professional relationship to be successful, it requires the disclosing information about financial matters and family relationships. The fiduciary will maintain the confidentiality of the case, and the information that you provide to the highest extent possible



Here to Help

Get in touch!

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