

CALIFORNIA PROBATE GROUP, LLC

Fee Schedule

This fee schedule outlines the standard compensation structures for California Probate Group. All fees are subject to the governing documents, the California Probate Code, and formal court approval where applicable.

A. Trust Administration

Each Trust is reviewed separately according to the required duties of the Trustee, the assets, and other professional contractors or managers that may be retained. If the Trust instrument is not specific, the following Ordinary and Extraordinary Fee schedules apply.

1. Ordinary Services Fee Schedule

Ordinary monthly trustee fees are calculated based on the total market value of Trust assets under management (including Real Estate Value) as determined on an annual basis.

Asset Value Bracket	Annual Percentage Rate
First \$1,000,000	1.10%
Next \$4,000,000	1.00%
Next \$5,000,000	0.75%
Next \$10,000,000	0.60%
On Balance	0.50%

Minimum Annual Fee: \$10,000.00

Examples of Ordinary Services: Locating and marshaling assets, determining values, notifying creditors, maintaining accurate financial records, re-registration and safekeeping of assets, investment management, collection of income, determining adequate insurance, bill paying, payment of estimated taxes, and general correspondence with beneficiaries.

2. Extraordinary Services Fee Schedule

When special or extraordinary services are performed, additional charges will be billed based on the following hourly rates (billed at 6-minute intervals):

Service Type	Hourly Rate
Administrative Duties Performed	\$195.00
Court Appearances	\$195.00
Real Estate Transactions/Management	\$220.00
Business Administration/Management	\$250.00
Participation in or Preparation of Tax Returns	\$195.00
Bill Payment & Technical Support	\$90.00

Examples of Extraordinary Services: Management of a business or closely held corporation; managing foreign, defaulted, or nonproductive securities; real property sales and management; extraordinary real estate repairs; extended asset sale negotiations; complicated discretionary distribution circumstances; litigation and non-judicial settlements; auditing, account set up, and environmental surveys.

B. Probate Administration Fees

The amount of compensation for "ordinary" services is fixed by California statute (Probate Code Section 10800) and is based on the overall inventory value of the probate estate and income received, less losses. Compensation is paid only after court order.

Estate Value Bracket	Statutory Fee Percentage
First \$100,000	4.0%
Next \$100,000	3.0%
Next \$800,000	2.0%
Next \$9,000,000	1.0%
Next \$15,000,000	0.5%
Amounts above \$25,000,000	Determined by Court

Extraordinary Services: The Probate Court may authorize additional compensation for extraordinary services (e.g., tax issues, real property sales, litigation). These are billed at \$195.00 - \$250.00 per hour.

C. POA / Healthcare Directive & Conservatorships

(Subject to court approval where applicable)

- **Professional Fiduciary:** \$195.00 per hour
- **Support Staff:** \$30.00 - \$150.00 per hour

D. Other Charges and Costs of Administration

Other charges may include but are not limited to: Superior Court Filing Fees, court reporter fees, e-file charges, attorney fees and costs, litigation-associated fees, fiduciary accounting preparation, tax preparation, payable taxes, postage, storage, and administrative support services (cleaning, maintenance, repair of real property).