

South Laurel Group

Pablo O'Brien, California Licensed Professional Fiduciary #1200

809 Laurel Street, #1166 | San Carlos, CA 94070

Phone: (650) 483-8233 | Fax (650) 514-9832

pablo@southlaurelgroup.com | www.southlaurelgroup.com

Schedule A SCHEDULE OF FEES Effective: August 1, 2023

Licensed Professional Fiduciary Services - Standard Rate **\$195/hour**

Licensed Professional Fiduciary Services - Complex Rate **\$255/hour**

Fiduciary Associate or non-financial tasks **\$95/hour**

Assets Under Management **First \$1M = 1.5%**
\$1M-\$10M = 1.25%
\$10M+ = Negotiable

- All hourly rates are billed to the 1/10th of the hour
- Fiduciary will charge a minimum of 1 hour per month once actively engaged.
- Complex rate is for litigation, complex tax matters, contested matters, and non-emergency nights and weekend work requested by client.
- Please note that in the capacity(s) that we will be retained to serve, we may be required to engage the services of an independent attorney or other professionals to assist us and these costs are borne directly by the Trust, Conservatorship, Estate, Client, Corporation or other Legal Entity. These fees, costs and expense are not part of this firm's compensation and will be passed on at cost.
- Fees are invoiced monthly and paid from client funds. Fees paid from decedent estates or Conservatorship funds are only paid upon court approval (if required). Conservatorship invoices will be paid 40% prior to court approval **(Rule 11 V. (4))**. If the court previously granted periodic payments on account of conservatorship fees pursuant to Probate Code Section 2643, those periodic payments will instead be collected.
- Normal travel time is billed at Fiduciary's standard rate for one direction. Any long-distance travel (over one hour) is billed at Fiduciary's discretion.
- Travel costs will be passed through at cost

All South Laurel Group fees are negotiable before appointment.
The above rates may be adjusted from time to time with a 30-day notice to clients.