

# South Laurel Group

*Pablo O'Brien, California Licensed Professional Fiduciary #1200*

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## **Schedule A SCHEDULE OF FEES Effective: August 1, 2023**

<b>Licensed Professional Fiduciary Services - Standard Rate</b>	<b>\$195/hour</b>
<b>Licensed Professional Fiduciary Services - Complex Rate</b>	<b>\$255/hour</b>
<b>Fiduciary Associate or non-financial tasks</b>	<b>\$95/hour</b>

**OR**

<b>Assets Under Management (annual)</b>	<b>First \$1M</b>	<b>1.5%, then</b>
	<b>\$1M-\$5M</b>	<b>1.25%, then</b>
	<b>\$5M-\$10M</b>	<b>1.0%</b>
	<b>\$10M+</b>	<b>Negotiable</b>

- Hourly rates (Standard or Complex) will apply for work done under Power of Attorney or as an advisor. Assets Under Management rates will apply for work done as a Trustee.
- All hourly rates are billed to the 1/10<sup>th</sup> of the hour
- All Assets Under Management percentages are annual, billed monthly on a pro-rated basis.
- 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 expenses 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).
- 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 for travel over one hour

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.