Dru Parker
California Licensed Professional Fiduciary #969
454 Las Gallinas Ave., PMB 274, San Rafael, CA 94903
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Parker Fiduciary Services

SCHEDULE OF FIDUCIARY FEES AND DESCRIPTION OF SERVICES
Effective February 1, 2025

Trust Administration, Agent Under Power of Attorney/Advanced Healthcare Directive, Bill Pay

Level 1: Support services (bill pay, travel)	$95.00 per hour
Level 2: Professional Services	$175.00 per hour
Level 3: Court Appearances/Depositions	$250.00 per hour
Initial Onboarding Fee:	½ hour consultation free of charge; $350.00 (2-hour) file set-up fee / additional consultation fee charged at time of client visit or receipt of Estate plan.

Probate Administration: Executor or Personal Representative of Decedent Estate, i.e. will only, no trust. Please note – this means that if you have a TRUST and your estate will not be subject to Probate, the following does NOT apply.)

Statutory Fees pursuant to Probate Code §10800 are computed on a fee base comprised of gross assets, plus receipts and gains, less losses, as follows:

- 4% of the first $100,000
- 3% of the next $100,000
- 2% of the next $800,000
- 1% of the next $9,000,000
- 0.5% of the next $15,000,000
- Court discretion after $25,000,000

In addition to statutory fees, pursuant to Probate Code §10801, extraordinary fees can be requested for services such as, but not limited to, tax issues, real property sales and litigation. Though fees for extraordinary services are subject to court approval, extraordinary services are charged at the professional service rate of $175.00 per hour.

BILLING AND PAYMENT PROTOCOLS
Fiduciary will bill for actual time incurred. Fiduciary will charge for all activities undertaken in providing Fiduciary services to client or trust. There is no charge for the initial intake consultation up to 30 minutes. If, when Client and Fiduciary execute this agreement, Fiduciary has previously provided services or consultation to Client above and beyond the initial intake, or incurred costs as described in this agreement, such services and costs will be compensable to Fiduciary as provided herein.

Fiduciary will provide monthly, itemized invoices to client or designated party as applicable and the invoice will be paid from the client's funds unless other arrangements have been made. Any challenges to the invoice must be made within ten calendar days of receipt. The fee schedule is subject to change with 60 days' notice of any increase or change. Revisions to fees will be posted to www.parkerfiduciary.com, and the posted fee schedule will apply to all services at the time provided to the client.

Fees paid from probated decedent estates or Conservatorship funds are only paid upon court approval or under Probate Code §2643 and are subject to local court rules.

COSTS and EXPENSES

Any hard costs or expenses incurred in connection with Fiduciary's representation will be paid by client or trustee. If costs are advanced by Fiduciary, those shall be reimbursed from client or trust funds. Fiduciary will provide appropriate documentation or receipt. Fiduciary will charge either for vehicle miles driven on behalf of Client at the current federal rate, or at the travel hourly rate.

OUTSIDE SERVICES

Tax returns are generally prepared by outside professionals who are paid directly from client funds. Annual accountings may be prepared by Parker Fiduciary Services OR prepared by outside professionals, depending on the situation, and the fee is paid from client funds.

Parker Fiduciary Services is not a law office and attorney fees and legal fees are paid directly to attorneys by client funds, with court approval when required.

HOURS OF SERVICE AND RESPONSIBILITIES OF FIDUCIARY, CLIENTS, AND INTERESTED PARTIES

Fiduciary will perform the responsibilities called for under the terms of the client's trust agreement or governing law. Fiduciary will provide an annual trust accounting unless the trust calls for more frequent accountings. POA accountings are provided on a case-by-case basis.

Parker Fiduciary Services' office hours are weekdays 9:30 am to 5:00 pm Pacific Time. Clients and others are encouraged to contact Fiduciary by phone or email during these hours. If Fiduciary is not available an effort will be made to reply within 24 hours, not including weekends and legal holidays. Please note, if there is an emergency Fiduciary will respond outside office hours. In such cases, you may text, leave a voice mail, or send an email.

Fiduciary bills for all work, including emails and phone calls. Fiduciary strives for efficiency and email is the most efficient means of communication. Text messages are acceptable only for simple communications. Fiduciary may mandate all communication be email only. Fiduciary may charge time-and-a-half for services provided outside business hours.

Fiduciary, Client, and interested parties will treat one another with respect and courtesy and communicate in a professional manner.

NOTICE TO CONSUMERS

Dru Parker, License No. 969, is a Professional Fiduciary licensed by the Professional Fiduciaries Bureau with the California Department of Consumer Affairs.
Telephone and Website: (916) 574-7340; www.fiduciary.ca.gov

Client Initials ________ ________