

WALLACE FIDUCIARY SERVICES

Darren Wallace, California Licensed Professional Fiduciary #594

P.O. Box 620624, Woodside, CA 94062-0624 | Phone: (650) 208-5509 | Fax (650) 241-1908

Darren@WallaceFiduciary.com | www.WallaceFiduciary.com

SCHEDULE OF FEES

Effective: January 1, 2022

Licensed Professional Fiduciary Services – Standard Rate	\$190.00 per hour
Licensed Professional Fiduciary Services – Complex Rate	\$240.00 per hour
Fiduciary Associate - Julie	\$135.00 per hour
Fiduciary Assistant - Nikki	\$110.00 per hour
Transaction Fee	1% of transaction

- All rates are billed to the 1/10th of the hour
- Fiduciary will charge a minimum of 1 hour per month.
- Complex rate is for litigation, complex tax matters, contested matters, and non-emergency nights and weekend work requested by client.
- Transaction Fee is for transactions such as real or personal property sales or leases, financing or foreclosure of real or personal property, sale of or collection of significant non-securities assets, negotiations for litigation settlement, or complex titling issues.
- 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 are cost 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. 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.

All Wallace Fiduciary Services fees are negotiable before appointment.
The above rates may be adjusted from time to time with a 60-day notice to clients.