



ADVENTUM IMPACT

Professional Fiduciary Rate Schedule

As of January 1, 2026

Professional Fiduciary hourly rate: \$300 per hour.

Administrative Staff hourly rate: \$175 per hour.

(Time is billed in increments of 1/10 of an hour.)

Real estate sales: 1.0% of market value of property at close of escrow.

Post-Death Trust Administration 0.5% of Gross Value of Estate

In addition to fiduciary fees, the trust/estate/conservatorship is responsible for necessary and reasonable expenses, which may include:

- Professional services (attorney, CPA, appraiser, investment advisor, and other specialized service providers.)
- Administrative costs (court filing fees, postage, notary services, bank charges). These third-party costs are paid directly from the trust/estate and are not compensation to me.

In addition to statutory fees, pursuant to Probate Code §10801, extraordinary fees calculated hourly can be submitted for services such as tax issues, real property sales, and claim litigation, and are subject to court approval.

In general, the purpose of estate planning is to avoid assets going through probate. In some cases, either by accident or by strategic design, probate may be necessary. Statutory probate fees are dictated by the California Probate Code under §10800.

Compensation reflects the time, responsibility, and liability I assume in administering your trust/estate. I follow industry best practices and provide clear billing records so all parties can see exactly what services were performed and why.