



AI Fiduciary – Fee Schedule

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California Licensed Professional Fiduciary License No. 1642

AI Fiduciary

www.aifiduciary.ai

Professional Fiduciary Services

Service	Rate
Licensed Professional Fiduciary	\$225/hour
Associate Licensed Fiduciary	\$175/hour
Fiduciary Case Coordination	\$135/hour
Administration Support	\$85/hour
Extraordinary Services	\$250-\$275/hour
Emergency/ Weekend/ Holiday	1.5x Standard Rate
Travel Time	50% Standard Hourly Rate
Air Travel	\$500/day + Expenses
Ongoing Administration Retainer*	\$600/month where applicable

All services billed in increments of one-tenth (.10) of an hour.

Rate Lock Provision

Client rates remain fixed for the duration of the engagement unless otherwise agreed in writing.

Ongoing Administration Retainer*

Applicable to active matters requiring ongoing fiduciary oversight, administration, and availability.

Typical Services Include

- Trust Administration
- Conservatorship Support
- Estate Administration
- Bill Payment & Budgeting
- Financial Oversight
- Real Estate Coordination
- Vendor Management
- Asset Inventory
- Beneficiary Communication
- Property Preservation & Oversight
- Court Reporting Coordination
- Property Disposition Oversight
- Care Coordination Support
- Court Appearances
- Mediation Participation
- Conservatorship Hearings
- Probate Hearings

Extraordinary Services Include

- Litigation support
- Business operations oversight

- Business liquidation
- Real estate sales coordination
- Evictions
- Multi-state asset administration
- Firearm disposition coordination
- Special Needs Trust administration
- Business interests / closely held businesses
- Cryptocurrency recovery or administration
- Asset recovery investigations

Third-Party Costs

The client, trust, or estate may also incur additional third-party costs including attorney fees, CPA fees, court costs, appraisal fees, contractor/vendor costs, postage/copying, filing fees, bond premiums, and property expenses. These expenses are billed separately from fiduciary compensation.

Billing Practices

- Time billed in tenths of an hour.
- Detailed billing records maintained.
- Invoices provided monthly unless otherwise required by court.
- Court approval obtained where applicable.
- Retainers may be required depending on matter complexity.

Alternative Fee Arrangements

**Extraordinary fees may apply in addition to standard hourly fees.*

Trust & Estate Alternative Fee Arrangements

- Alternative fee arrangements, including asset-based or percentage-based trustee compensation, may be considered depending on the nature, scope, and complexity of the engagement and will be agreed upon in writing where applicable.

Cost Reimbursement for Out-of-Pocket Expenses

- In addition to regular annual or hourly fees, reimbursement for out-of-pocket costs incurred will be reimbursed. Examples of these costs include, but are not limited to overnight express delivery charges, accountings outsourced to third parties, tax preparation, valuations, court filing fees, reasonable travel expenses out of the local area, and necessary out-of-pocket expenditures.

Extraordinary Fees

- In addition to regular fiduciary fees, reasonable fees for any extraordinary services beyond that normally completed in the daily administration of a trust will be charged. Examples of these tasks would be litigation support, accounting preparation, real estate sales or purchase, and business enterprise management or sales. (Fees would be subject to approval per documents or from appropriate parties prior to being charged.)

General Disclosures

- 1) AI Fiduciary services are based on a reasonable fee for service depending on the level of work, the expertise needed, and the length of time required. This would include, as an example, but not limited to, time in meetings with client, on the telephone or in conferences with clients or others concerning your affairs, time spent in negotiations, travel, waiting or preparing for, or performing other fiduciary services for client. Included in this fee are all out-of-pocket expenses normally incurred in service, such as photocopy charges, regular postage, telephone, fax and computer services, and local automobile mileage charges and tolls.
- 2) Travel outside the primary service area may be billed separately where applicable.
- 3) Most Accountings and Tax Returns are prepared by outside contractors not employed by AI Fiduciary & Business Advisory Services fees for these services are paid from client funds.
- 4) AI Fiduciary is not a law firm and we do not provide legal services. Legal services are paid to attorneys directly from client funds.
- 5) Alternative compensation arrangements may be considered for select trust and estate engagements where appropriate.
- 6) Fees can be reviewed upon request.
- 7) AI Fiduciary utilizes delegation practices where appropriate to ensure services are performed at the most reasonable applicable billing level.
- 8) After-hours, emergency, weekend, or holiday services may be billed at an adjusted rate where appropriate

Serving clients throughout Northern California

This fee schedule is provided for informational purposes only and may be adjusted depending on the complexity, scope, and requirements of each engagement.

AI Fiduciary reserves the right to decline engagements that present conflicts of interest, exceed current capacity, or fall outside the firm's expertise.