



Shangri La Fiduciary Services

“Committed to the well-being and legacy of my clients”

Intake Fees

\$250 flat rate to intake an individual. \$500 for a couple. Includes initial meeting, review of legal documents, and an intake meeting to review intake forms and ensure all the information is available when I need to act.

Professional Fiduciary Services \$175 per hour

- Trustee/Successor Trustee
- Guardianship/Conservatorship of the Person
- Guardianship/Conservatorship of the Estate
- Agent Under Power of Attorney/Agent Healthcare Directive

Post Death Trust Administration

1% of Gross Value of Estate on First \$2,000,000
 .8% of Gross Value of Estate on Next \$2,000,000
 .65% of Gross Value of Estate on Next \$3,000,000
 .55% of Gross Value of Estate on Next \$5,000,000 and over
 Real estate sales facilitated: 1% of sales price at close of escrow
 Minimum annual fee of \$5,000; Fees calculated annually.

Probate Administration Fees

Fees payable to the Professional Fiduciary as the Personal Representative for customary services are authorized under Probate Code 10800 and, 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 above hourly rates.

Additional professional fiduciary fees may be charged at hourly rates as stated above for unusual/extraordinary services such as, but not limited to, complex tax issues, complex real property sales and litigation.

Client Name: _____
 Fiduciary Initials: _____

Client Initials: _____

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Billing and Additional Costs

- Fees are billed monthly and paid from client funds. Decedent estate and conservatorship fees are paid upon court approval. Conservatorships will be billed for periodic payments on account as determined by the court based upon case circumstances and will be paid by client funds.
- All Services are billed in 1/10th of an hour (6 minute) increments.
- All time expended is billed, including, for example, phone call discussions, email or text communications, conference calls, meetings, research and investigation, analysis, payment of bills, reconciliation of accounts, one-way travel and all other activities associated with the case.
- Long distance travel (over 1 hour) is billed at Fiduciary’s discretion.
- Direct and out-of-pocket costs and expenses incurred shall be itemized and charged back for reimbursement. These can include parking, tolls, court costs, extraordinary postage, delivery fees, extraordinary reproduction services and other costs associated with administering the trust/estate.
- Professional services such as accounting, tax preparation, investment management, care management and legal services are contracted with sources outside of Shangri-La Fiduciary Services and are paid for with trust/estate funds.

**The rates listed above are the current rates for services as of September 1, 2025.
 Fees are subject to change. Active clients will be given a 60-day written notice of the change.
 New rates will be updated on the website once implemented.

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