

Ronald Patterson, CLPF #195  
Nicole Patterson, CLPF #1084  
Patterson Fiduciary Service  
PO Box 20445  
Castro Valley, CA 94546  
nicole.pa@yahoo.com  
Website: [PattersonFiduciary.com](http://PattersonFiduciary.com)  
Ph: 510-589-3829

## SCHEDULE OF FIDUCIARY FEES

Effective January 1, 2023

### TRUST ADMINISTRATION SERVICES

1% of the market value of trust assets per year, or hourly at \$175 per hour, whichever is greater.

### PROBATE ADMINISTRATION SERVICES

Statutory probate fees for customary services are authorized under Probate Code §10810, and are computed on a fee base comprised of gross assets, plus receipts and gains, less losses on the following schedule:

- 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 §10811, extraordinary fees may be requested for services such as tax issues, real property sales and litigation. Though subject to court approval, extraordinary services are charged at the hourly rate of \$175 per hour.

The following services are billed at Patterson Fiduciary Service's hourly rate of: \$175 per hour:

- Agent Under Power of Attorney/Attorney-in-Fact
- Agent for Healthcare
- Case Management Services

#### FIDUCIARY ACCOUNTING PREPARATION

\$100 per hour

#### GENERAL NOTES

Patterson Fiduciary Service's hourly rate is \$175 per hour, whether performed by Ronald Patterson, Nicole Patterson, or by an agent or employee under their direction and authority. All services will be charged at a minimum of one-tenth (0.10) of an hour. Fees will be billed for all work done on a client's matter or behalf, which includes, but is not limited to: travel, client visits, telephone calls, correspondence (including emails), meetings, research, document review, document preparation, deposition and court preparation and attendance, consultation and related administrative support. Travel time is billed round trip door-to-door at one-half (1/2) Patterson Fiduciary Service's hourly rate. Expenses are billed at cost to the client.

This fee schedule is subject to change with reasonable and required notice.

Fees charged may vary case-by-case, depending on circumstances.

*NOTICE TO CONSUMERS: Ronald Patterson (License No. 195) and Nicole Patterson (License No. 1084) are California Licensed Professional Fiduciaries licensed by the Professional Fiduciaries Bureau with the California Department of Consumer Affairs. Ph: (916) 574-7340; Website: [www.fiduciary.com](http://www.fiduciary.com).*