

Tulin Melton

California Licensed Professional Fiduciary & National Certified Guardian

SCHEDULE OF FIDUCIARY FEES

(Effective June 1, 2026)

Base Rate: **\$185 per hour**

Includes trustee, conservator, and estate administrator duties such as court appearances (if necessary), tax returns, accountings, investigation of assets, real estate transactions, asset and investment management, doctor appointments, case and care management, and all client communications, including communications with family members, counsel, accountants, care managers, trust beneficiaries, intestate heirs, financial planners/advisors, banking institutions, facility administrators, doctors, dentists and other professional communications.

Bookkeeping: **\$125 per hour**

Reconciling accounts, monthly reports, accounts receivable if necessary, and bank deposits.

Para Professional Services: **\$150 per hour**

Rate for various staff-related tasks including but not limited to, shopping for clients, post office trips for overnight or certified mailings, scanning and organization of documents, etc.

Court Appearances: **\$250 per hour**

Attending hearings, including testifying in court.

Complicated trusts that require an extensive amount of management may be negotiated at up to 1% of the market value of assets being managed annually.

Fees for the sale of real property are based on 1% of the sales price of the subject property. This includes all fiduciary work related to the sale and is a flat fee.

Note: All conservatorship fees are subject to Court approval under the California Probate Code and/or the Local Rules of the Court. All statutory probate fees and extraordinary estate representative fees in probate proceedings are also subject to Court approval. No fees in said matters are to be paid to the fiduciary without first obtaining a Court order.

Payment for monthly billing is due 10 days after submission. Interest will be charged at 1-1/2% per month on fees outstanding after 30 days.

Contract service providers are billed directly to clients when appropriate.

Reimbursement of fees paid to third parties for specialized services, such as real estate brokers, attorneys, collection agents, accountants, tax preparation, and real estate management, will be paid directly by the estate. Reimbursement will be made directly from the estate for expenses such as postage, copying, faxes, extraordinary travel, and parking. Travel time is billed from portal to portal.

The above compensation rates may be adjusted annually after 30 days' written notice.

Regular business hours are 9:00 a.m. to 5:00 p.m. Monday through Friday. Telephone calls initiated outside regular business hours may be billed at \$250/hour.