



Mark Watson
Professional Fiduciary

WATSON FIDUCIARY 2024 RATES

GENERAL/CASE MANAGEMENT \$240.00 per hour
Coordinating/interacting with family, lawyers, banks, financial planners, care managers, caregivers, doctors, contractors and other relevant parties in regards to the care of the conservatee and/or estate.

ADMINISTRATIVE ASSISTANT \$145.00 per hour
Filing, organizing, errands, data entry.

Fiduciary's Ordinary Hourly Charges:

Fiduciary will charge in increments of one tenth of an hour, rounded off for each particular activity to the nearest one tenth. This is the minimum time charged for any particular activity. Fiduciary will charge for all activities undertaken in providing Fiduciary services to Client under this agreement, including, but not limited to, the following: conferences, correspondence and Fiduciary documents (both review and preparation); Fiduciary and asset research; emails, texts and telephone conversations.

Watson Fiduciary
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License #744

ADMINISTRATION FEE AGREEMENT

ESTATE/TRUST OF _____

CLIENT NAME(S) _____

SERVICES TO BE RENDERED:

- TRUST ADMINISTRATION**
- PROBATE ADMINISTRATION**
- OTHER SERVICES:** _____

FEE SCHEDULE

	<u>Trust Administration</u>	<u>Probate Administration</u>
Base Fee	\$5,000.00	\$0.00
Valuation Adjustment	1% of the 1st \$500,000	4% of the 1st \$100,000
	.90% of the next \$250,000	3% of the 2nd \$100,000
	.80% of the next \$250,000	2% of the next \$800,000.
	.70% of the next \$1,000,000	1% of the next \$9,000,000
	.60% of the next \$8,000,000	

- A. TRUST ADMINISTRATION:** Base fee of \$5,000 plus valuation adjustment. Does not include tax return preparation, litigation, court costs, or expenses.
- B. PROBATE ADMINISTRATION:** Statutory fees pursuant to Probate Code Section 10810, extraordinary fees as approved by the court, and expenses.
- C. HOURLY BASIS:** For excessive time above and beyond normal administration You will be billed hourly at our normal hourly rates. Those rates are currently \$240 per hour for fiduciary time, and \$145 for administrative assistant time.

CLIENT SIGNATURE: _____

DATE: _____