



## Standard Fee Schedule January 2021

Guardian Finance and Advocacy Services is a 501 (c) 3 nonprofit organization.

The fees we charge pay for the cost of our services and support our mission. These rates are subject to adjustment as needed to meet contracts, regulatory requirements, or a client's ability to pay.

### Appointed Services

#### Conservatorship (Court Appointed):

- Base rate is \$175/month. Paid monthly.
- For management of real estate and/or investable assets over \$100,000, add \$125/month. Total is \$300/month. Paid monthly.
- Costs associated with the receipt of Social Security and VA income are assessed under VA Fiduciary and / or Representative Payee authorities. Other revenues, such as pensions, annuities, etc. are assessed at four percent (4%) of these revenues. Paid monthly.
- For real estate management, add three percent (3%) of net proceeds from sale.
- Non-professional fee of \$25.00/hour in lieu of outside contractor costs
- One-time closing fee of \$600 to transfer or terminate conservator authority except where authority continues as personal representative.

#### Guardianship (Court Appointed):

- Temporary or Emergency authority: \$60 per hour plus \$70 per month
- Full Guardianship Monthly fee of \$235 including Payee Fee.
- Costs associated with the receipt of Social Security and VA income are assessed under VA Fiduciary and Representative Payee authorities.
- Fees charged to external fiduciaries: \$150.00/hour plus \$135 per month (or as negotiated).
- Non-professional fee of \$25.00/hour in lieu of outside contractor costs.
- One-time closing fee of \$300 to transfer or terminate case.

#### Representative Payee (Social Security Appointed)

- Social Security Administration-determined rate: \$45/month or 10% of Social Security benefits, whichever is lower.
- Drug and Alcohol fees are \$84 per month or 10% of Social Security benefits, whichever is lower.

#### VA Fiduciary (Veterans Administration Appointed)

- Veterans Administration-determined rate: monthly fee equal to four percent (4%) of income.

#### Personal Representative (Court Appointed executor of estate)

- \$125 per hour plus monthly fee of \$80 per.
- For real estate management, add three percent (3%) of net proceeds from sale.
- Non-professional fee of \$25.00/hour in lieu of outside contractor costs.
- One-time closing fee of \$500 to terminate authority
- Minimum annual fee: one percent (1%) of estate managed.

## Market Based Services

### Individual Trust Services

- Trustee Fees:
  - Set-up fee of four percent (4%) of trust assets deposited, up to a maximum of \$1,000.
  - Base rate: \$80 per month
  - Trust Officer fee: \$125.00/hour for time spent on account management.
  - For real estate management, add three percent (3%) of net proceeds from sale.
  - Non-professional fee of \$25.00/hour in lieu of outside contractor costs.
  - Minimum annual fee: 1% of trust assets managed.
  - One-time termination fee of \$500 if account is closed or moved to another trustee.
  - Upon the death of the beneficiary: a one-time closing fee of six percent (6%) of any remainder trust balance, up to a maximum of \$10,000.

### Pooled Special Needs Trust Services

- Trustee Fees:
  - Base rate is \$20 per month paid monthly.
  - Trust Officer fee: \$125.00/hour for time spent on account management.
  - Payee services fee (where bills are routinely paid) – \$45 per month.
  - Minimum annual fee: 1% of trust assets managed.

### Financial Power of Attorney

- Monthly income/expense management – four percent (4%) of income received. Including wages, pension, annuities, tribal payments, etc.
- Other services charged at \$60/hour.

### Money Management

- One on one financial counseling including budgeting, paperwork organizing, public benefit acquisition, credit counseling, etc.: \$60/hour

### Small Estate

- \$60 per hour
- Minimum fee: Ten percent (10%) of estate

## Other Fees

### Third Party Fees:

- Bank and investment management fees are passed through at cost.
- Attorney, accounting, or other extraordinary fees are passed through at cost.