



Soloway Fiduciaries, Inc.  
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## **SOLOWAY FIDUCIARIES, INC**

**LISA SOLOWAY, C.L.P.F.**  
**License No. 180**

### **FEE SCHEDULE**

#### **Trust Administration:**

##### Annual Fee:

- 1% of market value of account – \$400,000 to \$1,000,000
- .8% on next million (\$1,000,000 to \$2,000,000)
- .55% on next million (2,000,000 to \$3,000,000)
- .4% on next two million (\$3,000,000 to \$5,000,000)
- .2% thereafter up to 10 ten million (\$5,000,000 to \$10,000,000)
- .1% on \$10,000,000 and above

For trusts with fair market values under \$400,000 a minimum annual fee of \$4,000 will be charged. Fair Market Value of assets to be determined upon date trusteeship begins and reassessed annually at end of each calendar year.

Trusts with unusual assets or businesses may be assessed hourly charges on top of administration fees. We reserve the right to hire property managers for rental property.

We reserve the right to bill hourly for the inventorying and distribution of personal property when the estate planning documents do not have strong dispositive provisions.

#### **Estate Administration:**

Per California statutory probate rate, based upon size of estate. Possible extraordinary fees for matters such as the sale or supervising of a business, or defense of lawsuits.

#### **Conservatorship Admin:**

**Of the Estate (CoE):** Contra Costa court guidelines (currently 1% AUM)

**Of the Person (CoP):** Contra Costa court guidelines (currently \$195/hr)

**Forensic accounting:** \$250/hr