



fiduciary services

brought to you by council on aging

Fee Schedule*

The fees outlined here are applicable exclusively when Council on Aging (COA) acts as your Agent in a legal capacity. These fees are evaluated based on services rendered and are invoiced on a monthly basis.

Upon our receipt of documents appointing Council on Aging as your Agent, we kindly request a one-time Enrollment Fee of \$250. This fee is intended to cover the administrative costs associated with establishing a fiduciary relationship with the Client.

External professional services such as CPAs and consulting attorneys may accrue additional costs.

Extraordinary Fees: Council on Aging reserves the right to charge for services provided beyond the standard or routine fiduciary services, under the legal obligation to act in the best interest of the Client.

Services Upon Incapacity

- Successor Trustee
- Power of Attorney for Finance
- Power of Attorney for Healthcare (AHCD)

Special Needs Trusts

Administration of Special Needs Trusts is provided at the same hourly rates as services upon incapacity.

Services Upon Death

Successor Trustee

Estate Administration Fees

- Total Value at Date of Death
Fee: 1.0%
- Sale of Real Property
 - Residential - Fee: 0.5%
(of sale price)
 - Commercial - Fee: 1.0%
(of sale price)

Estate Administration fees accrued upon death are based on the annual value of the estate or the hours served, whichever is greater. Services are invoiced at the current hourly rates and collected monthly from the estate.

Hourly Rates

billed in 6-minute increments

Administration	\$95
Fiduciary Client Manager	\$115
Professional Licensed Fiduciary	\$150
Director of Fiduciary Services	\$150

Additional Service Fees

Mileage rates are based on the Federal mileage rate and modified annually. Mileage is invoiced to the client on the monthly statement.

Notary Services are available to Clients at \$15 per signature; fee does not include travel expenses. Mileage rates apply to all off-site notarizations.

Photocopies are provided at \$0.15 per page.

Postage is charged at the Federal rate.

Annual Engagement Program upon request

*Rates are subject to change, and the Client will be provided with a written notice at least 30 days in advance.

effective 01/01/2025

Questions? Please contact the Fiduciary Services Coordinator at 707-525-0143 x122