

# FEE SCHEDULE for Rebecca Lilley, CLPF #1129, NCG

**HOURLY FEE SCHEDULE:** Current Hourly fees are \$170 per hour.

**ASSET-BASED TRUSTEE FEE SCHEDULE: As of 1/1/2023**



**State of California**

**PROBATE CODE**

**Section 10800**

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10800. (a) Subject to the provisions of this part, for ordinary services the personal representative shall receive compensation based on the value of the estate accounted for by the personal representative, as follows:

- (1) Four percent on the first one hundred thousand dollars (\$100,000).
- (2) Three percent on the next one hundred thousand dollars (\$100,000).
- (3) Two percent on the next eight hundred thousand dollars (\$800,000).
- (4) One percent on the next nine million dollars (\$9,000,000).
- (5) One-half of one percent on the next fifteen million dollars (\$15,000,000).
- (6) For all amounts above twenty-five million dollars (\$25,000,000), a reasonable amount to be determined by the court.

(b) For the purposes of this section, the value of the estate accounted for by the personal representative is the total amount of the appraisal value of property in the inventory, plus gains over the appraisal value on sales, plus receipts, less losses from the appraisal value on sales, without reference to encumbrances or other obligations on estate property.

(Amended by Stats. 2001, Ch. 699, Sec. 2. Effective January 1, 2002.)

- *An hourly rate may be applied in lieu of an Asset-Based Trustee Fee as agreed upon by parties at time of engagement.*

Other Terms:

- The trust will be responsible for all third-party charges including, but not limited to, shipping, insurance, re-registration, valuations, notary, tax-return filings, accountings, third-party investment management fees, real property management fees, legal expenses and travel expenses as necessary. Mileage will be charged at the applicable IRS rate for non-local travel.
- Administrative Services are billed at an hourly fee of \$55/hour.
- Trust Real Estate sales and purchases could be subject to a 1% fee.
- The above Asset-Based Trustee Fees do not include excess personal services. All fees herein are subject to change. 30-day advanced written notice will be provided before any fee change takes effect.

