



Standard Fee Schedule January 2024

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

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

Appointed Services

Conservatorship (Court Appointed):

- Base Conservator rate is \$200/month, including Payee services. Assessed monthly.
- To manage real estate or investable assets over \$100,000, add \$140/month to the base rate. Total is \$340/month. Assessed monthly.
- For Conservator/Legal Custodian joint clients, the organization will charge the VA fee of 4% or the conservator fee, whichever is greater.
- Other revenues, such as pensions, annuities, etc., are assessed at one percent (4%) of these revenues and added to the base rate, assessed annually, and collected monthly.
- Special conservator authority: \$140 per hour plus \$110 per month
- Non-professional fee of \$50.00/hour instead 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: \$75 per hour plus \$90 per month
- Full Guardianship Monthly fee of \$260, including Payee services.
- Costs associated with the receipt of VA income are assessed under VA Fiduciary authority.
- Fees charged to external fiduciaries: \$150.00/hour plus \$150 per month (or as negotiated).
- Non-professional fee of \$50.00/hour instead of outside contractor costs.
- One-time closing fee of \$300 to transfer or terminate the case.

Representative Payee (Social Security Appointed)

- Social Security Administration-determined rate: \$54/month or 10% of Social Security benefits, whichever is lower.
- Drug and Alcohol fees are \$100 monthly or 10% of Social Security benefits, whichever is lower.

VA Fiduciary (Veterans Administration Appointed)

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

Personal Representative (Court Appointed executor of the estate)

- \$150 per hour plus a monthly fee of \$65.
- For real estate management, add three percent (3%) of net proceeds from sale.
- Non-professional fee of \$50.00/hour instead 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: \$65 per month
 - Trust Officer fee: \$140.00/hour for time spent on account management.
 - For real estate management, add three percent (3%) of net proceeds from sale.
 - Non-professional fee of \$50.00/hour instead of outside contractor costs.
 - Minimum annual fee: 1% of trust assets managed.
 - One-time termination fee of \$500 if an account is closed or moved to another trustee.
 - Upon the beneficiary's death: a one-time closing fee of six percent (6%) of any remaining trust balance, up to a maximum of \$10,000.

Pooled Special Needs Trust Services

- Trustee Fees:
 - Base rate is \$25 per month, paid monthly.
 - Trust Officer fee: \$140.00/hour for time spent on account management.
 - Minimum annual fee: 1% of trust assets managed.

Financial Power of Attorney

- Monthly income/expense management – four percent (4%) of income received. Including wages, pensions, annuities, tribal payments, etc.
- Other services charged at \$75/hour.

Money Management

- One-on-one financial counseling, including budgeting, paperwork organizing, public benefit acquisition, credit counseling, etc.: \$80/hour

Small Estate

- One-time fee of \$25 per check transaction.

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.