



## Standard Fee Schedule January 2025

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 \$265/month. This includes Payee services. Assessed monthly.
- To manage real estate or investable assets over \$100,000, add \$145/month to the base rate. Total is \$410/month. Assessed monthly.
- For listing and selling real estate, \$150/hour.
- Fees charged to Insurance: \$150.00/hour plus \$200 per month (or as negotiated)
- For Conservator/Legal Custodian joint clients, the organization will charge the VA fee of four percent (4%) or the conservator fee, whichever is greater.
- Other revenues, such as pensions, annuities, etc., are assessed at four percent (4%) of these revenues and added to the base rate, assessed annually, and collected monthly.
- Special conservator authority: \$150 per hour plus \$200 per month
- 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 \$150 per month
- Full Guardianship Monthly fee of \$265, including Payee services.
- Costs associated with the receipt of VA income are assessed under VA Fiduciary authority.
- Fees charged to Insurance: \$150.00/hour plus \$200 per month (or as negotiated).
- Professional fee of \$150.00/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: \$55/month or 10% of Social Security benefits, whichever is lower.
- Drug and Alcohol fees are \$103 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 recurring bill payment where applicable.
- One-time closing fee of \$500 to terminate authority
- Minimum annual fee: one percent (1%) of estate managed.

### Market-Based Services

**Battle Creek Office:** 693 Capital Avenue, SW, Unit 3, Battle Creek, MI 49015 *Phone* 269.963.3253 *Fax* 269.966.2485

**Kalamazoo Office:** 2323 Gull Road, Suite A, Kalamazoo, MI 49048 *Phone* 269.344.0688 *Fax* 269.344.303

### **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: \$75 per month
  - Trust Officer fee: \$150.00/hour
  - Minimum annual fee: one percent (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 \$30 per month, paid monthly for recurring bill payment processing where applicable.
  - Trust Officer fee: \$150.00/hour.
  - Minimum annual fee: one percent (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 \$150/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 \$300 or Ten percent (10%) of the estate, whichever is greater

### **Contractor**

- \$150/hour for contracted services.

### **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.