THE CORPORATION OF GUARDIANSHIP

INTAKE PROCESS FOR FUTURE CLIENTS
FEE SCHEDULE - 2020

CoG's fees are subject to change annually at the discretion of the CoG Board of Directors.

While anyone can nominate us to serve in any legal document, CoG may not have the resources or capacity to accept all appointments. If a prospective client would like to nominate us for a future fiduciary role,* we encourage them to complete our intake process upfront. The intake process includes a review of the legal documents as well as the client's finances, personal preferences, and expectations for the scope of services. Prospective clients are not required to complete our intake process or utilize our care management services in advance of needing our fiduciary services. However, we are more likely to accept a fiduciary appointment when we have an existing relationship.

Once the client's legal documents have been approved and the activation fee has been paid, the client will have an open Care Management file in our system. Going forward, we are glad to develop a plan for periodic check-ins initiated by our staff that will allow us the opportunity to get to know the client better. Alternatively, we can simply be available on an as needed basis to provide the client with Care Management support.

Fees	Amount & Description
Activation Fee (one-time fee due upon the opening of a file with CoG)	$150 one-time fee This fee includes initial meetings and conversations with CoG's Executive Director and/or other key staff.
Fees	**Amount & Description**
Legal Document Review (hourly rate, billed immediately)	Typical hourly rates are $250-$300 per hour This review is completed by an attorney of our choosing and will be billed to the client.
Fees	**Amount & Description**
Care Management Fees (applied monthly in tenths of an hour increments; invoices will be sent the month following the delivery of service.)	$150 per hour Care Management may include in-person meetings with clients and their families, assessments of the client's needs, telephone consultation and advocacy, review of existing support services, linkage to needed services, and assistance with budgeting. These services are provided at the request of the client or their legal representative.

* Future Fiduciary Roles might include successor Agent under a Power of Attorney, successor Trustee of a Special Needs Trust, primary Agent under springing Power of Attorney, or primary Trustee of an unfunded Special Needs Trust.