



THE CORPORATION OF
GUARDIANSHIP

2024 FIDUCIARY FEES - POWER OF ATTORNEY (Financial & Health)

This fee schedule is regularly reviewed by our Board of Directors and is subject to change.

ESTABLISHING FUTURE SERVICES	
Legal Document Review Fee (one-time flat fee due prior to legal review)	\$350
Enrollment Fee (one-time flat fee due upon completion of intake)	\$1,500
Optional Care Management (hourly fee)	\$150 per hour, upon request
Pre-Payment of Funeral Expenses (one-time expense; required w/in 90 days of activation)	Varies (Estimate \$3,000 for cremation, \$10,000 for burial)
ACTIVE SERVICE AS AGENT UNDER POWER OF ATTORNEY	
CoG Fees	
Initial Activation Fee (one-time flat fee due upon assumption of duties)	\$2,500
Annual Fiduciary Fee (charged quarterly) (subject to minimum annual fee)	1.25% of assets under management + .50% if interest in real property - .25% for balances over \$3 million
Minimum Annual Fiduciary Fee (charged quarterly)	\$3,000 annually (\$750 quarterly)
Annual Unique Asset Fee (flat fee, per each unique asset managed)	\$500 annual fee for each unique asset managed (home, vehicle, annuity, insurance policy, IRA)
Care Management (hourly fee)	\$150 per hour
Legal Fees (hourly fee)	\$250 per hour
Miscellaneous Client Expenses (postage, copies, mileage, bank fees, court fees)	Varies
Outside Vendor Fees	
Annual Investment Advisory Fees (% of assets invested)	Varies, Estimate 1-1.25%
Annual Fiduciary Tax Return (hourly fee)	Varies, Estimated \$1500-\$3000
Annual Fiduciary Accounting (hourly fee)	Varies, Estimated hourly rate = \$25-\$35
Real Property Management Fee (monthly or quarterly fee if individual owns real estate)	Varies, up to \$350 per month
Other Professional Services (as needed, in the discretion of the Agent)	Varies