

**Hoggan Fiduciary Services**  
 Private Professional Fiduciary Services and  
 Probate Accounting Services for Trusts, Estates, and Conservatorships

Email: WillHoggan@gmail.com  
 Phone: 408-712-9457 | Fax: 408-317-9506  
 PO Box 32103, San Jose, CA 95152

**Schedule of Fiduciary Fees**

Effective June 1, 2026

Services	Fee
<u>Licensed Professional Fiduciary Services - Base Rate</u> Including but not limited to: ▪ Review of trust and estate planning documents ▪ Marshaling assets ▪ Property inventory ▪ Asset allocation and management ▪ Care coordination ▪ Tax coordination ▪ Distribution and final discharge planning ▪ Meetings and consultations with clients and service providers ▪ Payment of bills ▪ Consultation services to family or non-professional fiduciaries.	\$230.00 per hour
<u>Licensed Professional Fiduciary Services - Complex Services Rate</u> Complex services including but not limited to: ▪ Litigation, contested, or contentious matters ▪ Real estate transactions (sales, purchases, loans, routine evictions) ▪ Business operations ▪ Settlement discussions ▪ Property management ▪ Collection suits ▪ Complex tax matters ▪ Actions requiring unusual effort beneficial to the trust or estate ▪ Other issues requiring special skills or risks.	\$370.00 per hour
<u>Independent Court Accounting Services</u> Including but not limited to: ▪ Review of financial statements ▪ Analysis ▪ Data entry ▪ Court document preparation ▪ Account reconciliation ▪ Consultations on accountings ▪ Other supporting tasks. Note: rush jobs (with a deadline of three weeks or less from signing of Professional Services Agreement) incur a surcharge of \$50.00/hour.	\$215.00 per hour
<u>Personal Assistance</u> Including but not limited to: ▪ Client transport to medical appointments and waiting for appointments ▪ Shopping assistance and errands ▪ Other related tasks.	\$135.00 per hour
<u>Travel</u> Billed portal-to-portal at the hourly rate for the services engaged.	Variable

- Unless Court monitored, fees are invoiced monthly and paid from client funds.
- Other professional services, such as for legal services, tax preparation and consultation, financial planning, investment brokerage, and real estate transactions, are paid directly from client funds, at cost, and with court approval (if needed).

This fee schedule is subject to change with reasonable and required notice.