VARNESE
ESTATE SERVICES

Fiduciary Services • Trust Administration • Estate Consolidation • Daily Money Management •Legacy Care • Notary

Fee Schedule

Effective: March 1, 2026

Hourly rates are billed in 1/10th of the hour increments

SERVICES PROVIDED:	**FEE:**
Initial Fiduciary Consultation	
* Initial 30-Minute Complementary Assessment Meeting w/ Lisette Varnese.	*$0/Fee*
Hourly or Negotiated Rate	
* CA Licensed Fiduciary, Trustee, Estate Consultations & Complex Services.	*$250/hour*
Client Onboarding Process	
* Comprehensive review of Trust/EP Documents & Initial Document Set Up	*$695/Flat rate*
Legacy Care	
* LV RN Concierge Services	*$125/hour*
* Medical Care & Caregiver Coordination, Benefits and Assistance.	*$95/hour*
* Personal Assistance, Shopping w/client, Routine Companion Services.	*$50-65/hour*
* Errands or Shopping on behalf of client (not w/client).	*$65/hour*
Account Management	
* Daily Money Management, Financial Forecasting and Budgeting.	*$250/hour*
Billing Administrator	
* Accounts Payable & Receivable.	*$95/hour*
* Set Up of Online Bill Pay Services & Recurring Transactions.	*$95/hour*
* Property Management accounting services -ad hoc or onboarding by the hour	*$125/hour*
Administrative Services	
* Routine Clerical Tasks – File maintenance, Organizing, Scanning/Digitizing.	*$80/hour*
* Online Purchasing	*$80/hour*

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Notary Services * Per Signature Fee.	*$15/each*
Notary Services Add'l * Trust Document Review, Single Witness Service, Photocopies/Digital Filing. *(Additional witness, subject to add-on fee of $50+)*	*$250/FRP*
Inventory & Estate Consolidation Services * Based on per staff / per day rate.	*TBD*
Storage Fees * Documents/file boxes/physical items stored by VES / per month or annual.	*TBD*
Additional Monthly Base Fee for High Balance Trusts: * Dependent on estate value or complexity, specific services included: Accounts receivable, collecting routine income and making bank deposits. Routine accounts payable, includes bill paying and disbursements. Reconcile routine main checking account, print monthly reports. Routine mileage. Regular postage. Fax and routine copy charges are all included in the Monthly Base Fee. * Or a fee of 1% of assets more than $5,000,000 asset value.	*$700 or $350 OR $175/month OR Sliding scale % of assets managed*
Real Property Transaction Fee * Sale, Purchase or Refinance of Real Property: At the Fiduciary's discretion, the percentage fee may be charged in lieu of hourly fees. * At the fiduciary's discretion, a percentage-based transaction fee may be charged in lieu of hourly fees when managing real property matters on behalf of a trust, estate, or conservatorship. This fee reflects the extraordinary time, coordination, and liability involved in such transactions.	*Residential .5%* *Commercial 1%*

Property Management Fees * Oversight and administration of trust-owned real property, including rent administration, vendor and contractor coordination, lease and compliance review, maintenance supervision, expenditure approvals, reporting, and beneficiary communications. Services are performed in Trustee capacity and do not constitute licensed real estate brokerage services. *Optional Percentage Fee:* At the Trustee's discretion and with advance written disclosure, a monthly or percentage-based property management fee (typically 3%–6% of gross rents or other agreed metric) may be charged in lieu of hourly billing.	*TBD*
Probate Estate Fees * Probate Administration fees are pursuant to CA Probate Code §10800.	*TBD*
Outside Service Costs & Reimbursements * Outside Services/Professionals are reimbursed directly from the Trust. * VES Client Expenditures are reimbursed directly from Trust: e.g. postage, photocopying, court fees, sales and purchases on behalf of client.	*Reimbursed to vendor or VES*