

STAM FIDUCIARY

PROFESSIONAL FIDUCIARY SERVICES | FEE SCHEDULE

Al Stam, California Licensed Professional Fiduciary (CLPF No. 1601)

Effective July 2026 — provided for estate planning and nomination purposes

Stam Fiduciary provides independent professional fiduciary services throughout Southern California, with a particular focus on estates and trusts involving non-U.S. citizen and internationally located beneficiaries. The fee structure below applies to service as successor trustee, agent under durable power of attorney, and related fiduciary roles.

FEE SCHEDULE

Nomination in estate documents	No charge. There is no cost to name Stam Fiduciary as successor trustee, executor, or agent in estate planning documents. Review of the governing instrument prior to accepting nomination is provided at no charge.
Professional fiduciary services	\$180 per hour. Billed for time actually worked upon commencing service, including trust administration, asset management and marshaling, distributions to beneficiaries, accountings, and beneficiary communications. Detailed time records are maintained and available to beneficiaries.
Administrative assistance	\$60 per hour. Routine administrative and clerical tasks — such as bill pay processing, document organization, filing, and scheduling — are billed at the lower administrative rate rather than the professional rate.
Executor / administrator compensation	Statutory. If serving as executor or administrator in a California probate proceeding, compensation follows the statutory schedule under Probate Code §10800, as approved by the court.
Outside professionals (extraordinary services)	Billed separately, re-invoiced at cost. Fees of attorneys, tax consultants and preparers, appraisers, and other professionals retained on behalf of the trust or estate are not included in the fiduciary's hourly rate. Such fees are paid separately by the trust or estate and re-invoiced to the client at cost, without markup.
Costs and disbursements	At cost. Third-party costs such as court filing fees, wire and bank fees, postage and courier charges, certified translations, and apostilles are passed through at cost, without markup.
Predictable-fee arrangements	Available on request. For clients who prefer fee certainty over hourly billing, Stam Fiduciary offers custom engagement structures, including fixed annual fees for ongoing trust administration and capped-fee arrangements with defined scope. These are quoted in advance based on the specific matter and set out in a written engagement letter.

TERMS

All fiduciary compensation remains subject to the reasonableness standard of the California Probate Code and to court review where applicable. Estate planning documents may reference the fiduciary's fee schedule as in effect at the time services commence; this schedule may be updated periodically. This document is informational and does not constitute legal or tax advice; questions regarding document drafting should be directed to the clients' estate planning attorney.