

GILA COUNTY PUBLIC FIDUCIARY FEE SCHEDULE

All guardianship, conservatorship, and decedent's estate fees charged by the Gila County Public Fiduciary's Office are subject to the review and approval of the Superior Court following notice of the requested fees and the hearing date being given to relatives and other interested parties, as required by the law. Anticipating approval by the Court, the Public Fiduciary may charge the fees and deduct them from the ward's account on a monthly basis, realizing that in some instances some or all of the fees charged may be denied by the Court. When fees are taken in advance of receiving Court approval of the fees, there should be demonstrated good cause to support each action, such as the need to minimize an estate's or ward's tax liability in a given year or to "spend down" a ward's account or estate to qualify for governmental benefits, or to simply charge the ward's estate appropriate monthly charges as they occur. In such instances, if the fee taken is not subsequently approved by the Court in whole or in part, the portion not approved will be reimbursed to the ward's account or estate.

Fees are calculated according to the following schedule: (In order to provide a service that meets the needs of our primarily indigent wards, the Gila County Public Fiduciary fees are calculated at the unlicensed hourly rate of \$11.76, while some services provided would warrant a much higher licensed fiduciary hourly rate.)

Guardianship and/or Conservatorship Matters

Referral, Investigation, Set-up Fees

Flat Rate/\$240.00

It takes over 22 hours of Public Fiduciary staff time for case staffing; make initial visit; locate the birth certificate and other identification; research heirs; locate and transfer bank accounts; set up internal client files (personal and financial files); locate, photograph and secure property; establish and implement spending plan; research health records and vital statistic records; coordinate with state and local benefits providers; complete required forms for the providers; locate a suitable private care provider, perform background check and collect necessary identification and insurance records; arrange for payment; research and establish irrevocable burial. Additional time is needed for seeking attorney related support for preparing court papers and documents, and making the court appearance for the appointment.

Guardianship and/or Conservatorship Fee Per Month

Flat Rate/\$60.00

Includes the following:

Case Management of at least 8 hours per month, including case staffing; monthly visits, including travel time and mileage; postage and office supplies; file maintenance and retention according to Supreme Court guidelines; facsimiles and telephone calls; application/renewal of benefits; complete mandatory payee reports; reviews of billings; bill payment; organization of tax records and meeting with tax professionals; reconciliation of bank accounts; monitoring of insurance claims; attendance of appointments and meetings for all services including physician's appointments; monitoring and storage of inventory items, and sale of personal property.

Annual Accounting Fee

Flat Rate/\$160.00

Final Accounting Fee

Flat Rate/\$200.00

Includes the following:

Accounting and Annual Report preparation (and response if required) which takes up to 10 hours of time for case staffing; legal document preparation, request for and review of physician's reports; review

pleadings and notarization; fee collection and record keeping; filing with Court (including travel time and mileage); copying and mailing to interested parties; calendaring and inner office filing; consultation with legal professionals; Court appearance if necessary.

Decedents' Estate (Personal Representative)

Referral, Investigation, and Set-up Fees

Flat Rate/\$250.00

It takes over 22 hours of Public Fiduciary staff time for case staffing; order the death certificate; locate other required identification; locate and notify heirs; locate and transfer bank accounts; set up internal client files; arrange for cremation or burial of the remains; determine the indigent status of the decedent and of his/her survivors; locate and secure property; preparation of affidavit for collection of property by heirs; distribution/donation of residual estate. Additional time is needed for attorney related support for preparing court papers and documents and making the court appearance for the appointment.

Purchase/Sale of Real Property

Flat Rate/\$150.00

It takes over 15 hours of Public Fiduciary staff time for case staffing; seek Court approval if necessary; conferencing with Real Estate Agency professionals regarding research and comparisons; appraisals; inspections; review of offers; set-up sales contracts; process and sign documents; conferencing with Mortgage Company professionals regarding processing and signature on documents; review and sign ESCROW paperwork; transfer titles; recorded documents; sending and receiving faxes; travel and mileage; notifications to government aid agencies.

Funeral Fee

Flat Rate/\$150.00

It takes over 15 hours of Public Fiduciary staff time for case staffing; research and set-up of financial account/and conference with mortuary professionals and family; notification of death to family, friends, providers, physicians, government agencies; obituary; funeral arrangements/attendance or preparation of indigent burial application and demand; preparation of documents and payment for services.

Annual Attorney Fee

Flat Rate/\$175.00

It takes over 1 hour of professional attorney time for preparation of annual documents; consultation with fiduciary professionals; collect and review physician's report, guardianship report and fiduciary fee records; obtain all signatures and notarizations; preparation of mailings; file documents with Court; Court appearance if necessary, receive signed orders and minute entries and copy to fiduciary, calendaring and documentation, maintain and store files according to state statutes and Supreme Court guidelines. This fee also encompasses the time spent monitoring, discussing, and implementing changes that occur in legislation that equally affects each client represented by the Public Fiduciary.