United Fiduciary Group

FEE SCHEDULE

Effective: September 1, 2026

PRINCIPAL LICENSED FIDUCIARY: $170 / hour

Provide the highest level of fiduciary oversight, professional judgment, and decision-making for complex fiduciary matters. Responsibilities include directing case administration; making substantive healthcare, placement, financial, legal, and asset management decisions; opening and closing financial accounts; authorizing significant transactions and distributions; executing real estate agreements, contracts, and other legal or financial documents; reviewing and signing client tax returns; directing attorneys and other professionals; and addressing complex or high-risk matters. Ensure fiduciary decisions comply with applicable authority, court orders, governing documents, and legal and ethical obligations.

LICENSED FIDUCIARY: $150 / Hour

Provide professional fiduciary oversight, decision-making, and case management for guardianships, conservatorships, trusts, estates, and other fiduciary appointments. Services include oversight of financial affairs, asset protection, budgets, property, insurance, and legal and administrative matters; reviewing and approving case actions; coordinating with attorneys, financial professionals, medical providers, care teams, and vendors; conducting client wellness visits; attending medical appointments and care conferences; evaluating care and placement needs; and advocating for client health, safety, and wellbeing.

ESTATE ADMINISTRATOR: $130 / Hour

Provide administrative case management for estates, trusts, guardianships, conservatorships, and other fiduciary matters. Responsibilities include coordinating case administration; preparing and managing court documents; monitoring court dockets and deadlines; maintaining case records; marshalling and securing assets; coordinating insurance applications, renewals, claims, and coverage; assisting with creditor and beneficiary matters; gathering documentation; and communicating with attorneys, courts, financial institutions, insurance providers, vendors, and other professionals.

ACCOUNT ADMINISTRATOR: $130 / Hour

Manage and maintain client and case financial records, including marshalling and securing assets, reconciling financial accounts, reviewing and paying client bills, and communicating with financial institutions. Prepares Inventories and Appraisements, Court Accountings, Conservatorship Budgets, Trust and Estate Accountings, bond analyses, financial reports, budgets, and sustainability projections. Assists with asset recovery and ongoing financial administration and reporting.

PROPERTY MANAGER: $135 / Hour

Provide oversight and coordination of client-owned real and tangible personal property, including inventories, property inspections, maintenance, repairs, cleanouts, vendor services, estimates, and property access. Manages the safeguarding, organization, disposition, sale, and distribution of tangible personal property and coordinates activities necessary to maintain or prepare real property for occupancy, transfer, or sale.

PROPERTY & CLIENT SERVICES ASSISTANT: $75 / Hour

Provides property and client support services, including assisting with real and personal property inventories, photographs, property visits, moves, cleanouts, and disposition or distribution of tangible personal property. Performs dual-control inventories as required and assists with client shopping, personal care needs, errands, bank deposits, court document delivery, and other routine support services that do not require substantive fiduciary decision-making.

CONTRACT COURT ACCOUNTING PREPRATION: $135 / Hour
Preparation of court-required accounting on a contract basis, including review and organization of financial records, reconciliation of accounts, classification of receipts and disbursements, preparation of accounting schedules and supporting documentation, and coordination with fiduciaries, attorneys, and other professionals to complete the accounting for court filing.

ESTATE / TRUST TERMINATION FEE: $750 - $1,500 Flat Fee
A one-time fee charged upon the conclusion of an estate or trust administration to cover final administrative closure, including completion of final distributions, closing financial accounts, organizing and archiving records, and other routine tasks necessary to formally conclude the administration. Fee range dependent on number of beneficiaries.

ESTATE PLAN NOMINATIONS: $300 Set Up Fee
Includes review of estate planning documents naming the fiduciary in a nominated or successor role, initial consultation with the client and/or estate planning professionals, establishment of the client file, and maintenance of an ongoing relationship to remain familiar with the client's circumstances, preferences, and fiduciary needs.

COSTS CHARGED DIRECTLY TO CLIENT

Postage	Actual Cost
Faxes	No Charge
Photocopies	No Charge
Long Distance Phone Calls	No Charge
Storage of Personal Property	Actual Cost
Bulk shredding requiring special pickup	Actual Cost
Shredding of Small Amount	No Charge
Mileage (IRS Approved rate)	Actual Cost

NOTES

1) Fees and expenses are subject to change with thirty (30) days' written notice to the parties as required by A.R.S. § 14-5109.

2) All services billed at an hourly rate will be billed at a 0.1 hour (1/10th of an hour) minimum increment. Tasks will be delegated to a person billing at the lowest appropriate billing rate. If the task or service cannot be delegated, staff will bill at the lowest appropriate billing rate. Most services provided under a court appointment are mandated by Arizona law (Title 14 of the Arizona Revised Statutes – "ARS"), the Arizona Rules of Probate Procedure, or the Arizona Code of Judicial Administration (ACJA).

3) Pursuant to A.R.S. § 14-5651
United Fiduciary Group, LLC is owned and operated by Tara Lara, a Licensed Fiduciary (License No. 20884), issued by the Arizona Supreme Court Administrative Office of the Courts, and is subject to regulation by the Arizona Supreme Court's Fiduciary Licensing Program. The regulations governing licensed fiduciaries and fiduciary entities are specified in the Arizona Code of Judicial Administration, § 7-201: General Requirements, § 7-202: Fiduciaries, and § 3-303: Professional Services. These administrative rules, adopted by the Arizona Supreme Court, include a Code of Conduct that all licensed fiduciaries are required to follow. Additional information regarding these requirements and licensed fiduciaries may be obtained from the Arizona Supreme Court.

Arizona Supreme Court – Fiduciary Licensing Program
http://www.azcourts.gov/cld/FiduciaryLicensingProgram.aspx
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