

**Maricopa County Public Fiduciary (MCPF)
Basis for Compensation - Fee Schedule and Description of Services**

MCPF's compensation for fiduciary services are a claim against the estate (guardianship, conservatorship, and decedent's estates) pursuant to A.R.S. § 14-5604. This claim complies with the governing AZ Laws, Rules and Code of Judicial Administration and specifically, A.R.S. § 14-5109, and the individual case is subject to Court approval upon Petition.

- Assigned Fiduciary Hourly Rate (billed at 1/10th increments)-----\$85/hr.**
Fiduciary Supervisor Hourly Rate (billed at 1/10th increments)-----\$95/hr.
Fiduciary Director Hourly Rate (billed at 1/10th increments)-----\$145/hr.

Public Fiduciary: Directly supervises licensed, trainees and non-licensed fiduciaries; triages decision making, forensic case analysis and recovery determination, directs outcomes and ensures competent banking operations and asset management, advocacy and person centered planning.

Licensed and Non-Licensed Fiduciaries: Provide deliverables to ensure the timely and accurate case administration, asset management, budget preparation, research and fact gathering for informed decision making, triage case information, advocacy, serve "On Call" to coordinate emergency response to medical issues, attend court hearings and testify in court.

MCPF Staff with other specialized licenses, guardianship certifications and "Fiduciary Trainees" pending licensure may also charge the "fiduciary hourly rate" when the service delivered to the client are compensatory to the services provided by the licensed fiduciary and are commensurate with the task performed, and beneficial to the client or reasonable and necessary. The fiduciary rate may only be charged for services requiring a fiduciary skill level.

Benefits/Burial Advocacy Hourly Rate (billed at 1/10th increments)-----\$55/hr.

Benefits/Burial Advocates will provide coordination and government entitlements application and representation services to obtain benefits and burial arrangements.

Property Management (Non-Licensed Fiduciary) -----\$60/hr.

Property Management includes the delivery of services to protect and monitor the real and personal property under management. Property inspections are conducted, insurance procured and monitored, coordination and monitoring of estate sales.

Routine Bookkeeping/Tax Administration (4.0 hrs per mo)-----\$85/hr.

Routine Bookkeeping/Tax Administration include(s) the estate operations of setting up new accounts, documentation and data organization, retrieval and management; maintenance of audit trail documents, collection and organization of annual tax information; bank reconciliation, transaction posting of income, expenditures and interest; coordination of services with other tax, finance or legal professionals.

Shopping (6.0 hrs if Ward lives independently, 2.0 hrs if Ward in facility) -----\$25/hr.

Monthly Client Visit (one visit per mo Ward or Protected Person)-----\$85/hr.

Preparation of Conservator's Account and Budget(5.0 hrs per yr)-----\$85/hr.

Preparation of Annual Guardianship Report -----\$85/hr.

Marshaling of Assets/Preparation of Initial Inventory (80 hrs)-----\$85/hr.

Prohibited Billable Time: Time spent on billing, accounts receivable activities, preparation of itemized statements of work performed, copying, distributing statements, internal business activities of the fiduciary, including clerical or secretarial support, overhead, time and expenses spent to correct or mitigate fiduciary errors or defend against a regulatory complaint, or for misfeasance/malfeasance.

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Extra-Ordinary Fees: An award for extraordinary compensation to the fiduciary or fiduciary's attorney is within the discretion of the Court. The Judicial Officer will weigh the totality of the case, while applying consistent compensation guidelines and determine on a case-by-case basis whether "Extra-Ordinary Fees" will be awarded.

When the fiduciary or attorney requests approval of "Extra-Ordinary Fees" above the "Routine Benchmarks" and hourly billable rates described herein, an accurate and detailed account of the services performed and reasonable explanations shall be included with the Compensation Statement. The following is a non-exclusive listing of some activities which may warrant the Petitioning for Extra-Ordinary Fees:

- a. Selling, leasing, exchanging, financing or foreclosing real or personal property;
- b. Coordination of extensive or multiple legal actions;
- c. Administering or coordinating the administration of a protected person or decedent's business;
- d. Recovery actions and demands e.g. for the return of property, funds taken without authority or consent of the client; abuse or exploitation;
- e. Difficult family members;
- f. Multiple dealings with other professionals in sorting out the Estate issues;
- g. Client with revolving door presentation to medical or detention facilities resulting in triaging multiple discharges and admissions;
- h. Complex assets pending administration;
- i. Extensive research and fact finding; and
- j. Multiple residential placements.

Direct/Indirect Costs: The following costs are reimbursable by the Estate at the actual cost(s).

- Reimbursable goods or services obtained for or consumed by the Ward/Estate;
- Postage and shipping expenses;
- Deposition and transcript costs;
- Fees charged by a process server;
- Publication fees;
- Expert witness fees;
- Messenger costs;
- Case specific bonds; and
- Electronic database fees invoiced by an outside vendor, (e.g. Westlaw, LexisNexis, PACER) except for charges to research AZ Laws, Rules, Administrative Orders, and case law(s).
- Mileage: Charged at current IRS rate for business miles driven. (www.irs.gov)
- Travel: Necessary travel and waiting time may be billed at 100% of the hourly rate, except for time spent on other billable or administrative activities. Travel and waiting time are not necessary when the service can be more efficiently rendered by correspondence, electronic or telephonic attendance. Billable time that benefits multiple Wards/Estates shall be appropriately apportioned amount each client.