TRUE NORTH FIDUCIARY SERVICES

**Fee Schedule** ***(last updated April 2025)***

**Personal Representative Services** ***See below for fees***

When named in a will or appointed by the court, we serve as the estate's Personal Representative (also known as the Executor). In this role, we handle all probate-related responsibilities, including filing with the court, notifying beneficiaries and creditors, gathering and managing assets, paying debts and taxes, and ensuring timely and accurate distribution to heirs. Our goal is to reduce the administrative burden on families while ensuring full compliance with legal and fiduciary obligations.

Personal Representative fees are set by Oregon statute under ORS 116.173(3) and are as follows:

(a) Upon the property subject to the jurisdiction of the court:
- (A) Seven percent of any sum not exceeding $1,000.
- (B) Four percent of all above $1,000 and not exceeding $10,000.
- (C) Three percent of all above $10,000 and not exceeding $50,000.
- (D) Two percent of all above $50,000.

(b) One percent of the property, exclusive of life insurance proceeds, not subject to the jurisdiction of the court but reportable for Oregon estate tax or federal estate tax purposes.

**Estate Administration** ***Fee dependent on role and complexity of estate***

Estate administration encompasses the full range of tasks required to settle an estate, whether or not probate is involved. We may serve as the Personal Representative or work in a supportive role alongside family members, attorneys, or financial professionals. Our services include managing estate assets, assisting with trust distributions, handling paperwork, coordinating with institutions, and ensuring a smooth transition for all involved. We bring structure, clarity, and professionalism to each step of the process.

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**Conservator Services** *Hourly Rate: $110*

When an individual is no longer able to manage their financial affairs due to incapacity, we can be appointed by the court to serve as Conservator. In this role, we act in the best interest of the protected person, responsibly managing income, paying bills, preserving assets, and coordinating with caregivers and professionals. We take this duty seriously, providing thoughtful, ethical financial stewardship while treating the individual with dignity, respect, and compassion.

**Estate Organization** *Hourly Rate: $100*

We help individuals and families bring order to important documents, assets, and personal records. Whether preparing for estate planning or responding to a loss, we create structure and clarity to support informed decision-making.

**Additional Services - See below for fees**

- **Fiduciary Consulting** *Hourly Rate: $110*

  We provide fiduciary consulting in complex or collaborative matters, including ancillary probates, estate liquidations, and co-fiduciary roles—particularly for out-of-state executors or legal teams needing trusted local support. We also coordinate with estate-related service providers such as estate sale companies, relocation specialists, and movers, ensuring every detail is handled with care and professionalism during times of transition.

- **Bill Pay Services** *Hourly Rate: $100*

  We manage day-to-day bill payments and financial obligations for individuals who need extra support or oversight. Our service brings peace of mind to clients and their families by ensuring accounts are current, records are clear, and nothing falls through the cracks.

- **Real Estate Sales** *Percentage of sale price*

  We manage the sale of real estate tied to estates, trusts, or conservatorships, handling everything from property prep to final sale. With experience navigating legal and logistical complexities, we work to protect the value of the asset and ease the burden on families. We have licensed real estate professionals on staff who can assist with listing the home on the multiple listing service, or facilitating a cash sale if desired. In addition, we can coordinate repairs and cleanout services as needed, bringing peace of mind.

- **Notary Public Services** ***Fee Per Notarization: $10***

  We provide notary public services for estate, trust, and financial documents, ensuring signatures are properly witnessed and recorded. This added support helps clients, families, and professionals complete important transactions with confidence and ease.

We are currently accepting new clients.

If you have any questions or a client with needs outside those listed above, please call us.

We look forward to providing exceptional service to all our partners and clients.

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