

Coventry, Vernon, & Roberts, LLC

Professional Fiduciary / Estate & Trust Administration / Healthcare & Human Services Advocate
Serving with Compassion & Integrity

Roger T. Coventry
Fiduciary License No. 20451

Coy I. Vernon
Fiduciary License No. 20840

Daniel H. Roberts
Fiduciary License No. 20965

FEE SCHEDULE

Effective February 1, 2024

Financial Fiduciary Services

Principal, Licensed Fiduciary **\$225/hour**

Manages the provision of financial and human services; make all substantive financial and human services decisions; supervise the work of all licensed fiduciaries, human services advocates, estate administrators, and support staff; testify in court; communicate with clients, beneficiaries, families, attorneys, trustees, trust administrators and others involved in client's financial well-being.

Director of Fiduciary Services / Operations **\$195/hour**

Under the supervision of Principals, manages and directs administration/support of conservatorship, estate and trust administration; reviews and approves payment of incoming invoices; prepares financial status reports; reviews and prepares accountings, estate management plans, and bond analysis. Provides direction to human services advocates regarding client advocacy and coordination of care.

Licensed Fiduciary / Senior Estate Administrator **\$180/hour**

Under direct supervision of Directors, meet and communicate with clients, beneficiaries, families, attorneys, trustees, trust administrators and staff regarding client's financial affairs. Administer conservatorships and estates; secure and recover assets; manage banking/investment accounts; reconcile financial statements; review and pay incoming client bills; communicate with insurance companies and financial institutions; prepare financial status reports; prepare court accountings, estate management plans, and bond analyses.

Estate Administrator (EA) **\$145/hour**

Under direct supervision of Principal/Director, administer conservatorships, and estates; secure and recover assets; manage banking/investment accounts; reconcile financial statements; review and pay incoming client bills; communicate with insurance companies and financial institutions; prepare financial status reports; prepare court accountings, estate management plans, and bond analyses.

Asset Manager **\$155/hour**

Under direct supervision of Principal/Director, inventory, obtain digital images, secure, and obtain appraisal (when appropriate) of property; supervise maintenance of property, maintain exact records of all property; coordinate with realtors and maintenance personnel to facilitate the sale of real property; coordinates and supervises move of client's personal property.

Assistant EA & Asset Management Support **\$125/hour**

Under direct supervision of Managing Member/Director of Estate Services, assist with dual control for marshaling, securing, and inventory of personal property and financial documents; assist Estate Administrators and Asset/Property Manager as needed.

Data Entry **\$75/Hour**

Entry of data from: bank / investment account statements, income / expenses, etc.

Estate Termination Fee **\$700**

Termination of decedent's estates/trusts: A flat fee will be charged to cover necessary services after final distributions are calculated.

Contingency Fiduciary Services Set-up Fee (CVR named, but not acting as fiduciary) **\$400**

Meetings, estate plan summary, copies, establishment of file, and follow-up protocols, as needed.

Expert Witness **\$250/Hour**

Scope of services to be determined in an Expert Witness Services Agreement.

Guardianship / Human Services / Healthcare Advocate

Healthcare & Human Services Advocate (HSA)

\$170/hour

Under the direct supervision of a Principal/Director, perform assessments; participate in multidisciplinary human services conferences; testify in court; personally visit clients; monitor care delivery; coordinate a variety of ancillary services; provide crisis intervention; supervise the work of assistants; communicate with healthcare provider office staff regarding procedures and maintain confidential healthcare records; communicate with families and others involved in client's/ward's well-being.

(When called out at night, weekends, or holidays \$180/hour)

EA / HSA Support Services

\$85/hour

Includes various support services that: do not require advanced credentials, are not complicated, are not inherently risky, and do not include a significant potential for liability.

Exceptional Travel Time – for travel in excess of one hour (one way)

\$85/hour

Costs Charged Directly to the Client / Ward / Protected Person / Estate / Trust

Postage / Mileage (IRS approved rate) / Shredding

Actual Cost

Faxes / Photocopies / Long Distance Calls

No charge

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 of the 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) – sections noted below.
- 3) Coventry, Vernon, & Roberts, LLC is subject to oversight by our licensing entity, the Arizona Supreme Court - Fiduciary Licensing Program, the Superior Court of Arizona, attorneys involved in our cases, family, and other interested parties. Coventry, Vernon, & Roberts, LLC is licensed, bonded, and insured. In Arizona, it is standard court practice to order a specific bond to cover the assets and income under the control of a fiduciary. We are obligated, under ARS § 14 – 1104, to prudently manage the costs of administering cases entrusted to our care. Our practice is to document the valuable services we provide to the ward, protected person, or estate, such that the necessity, intrinsic value, and reasonableness are readily apparent.
- 4) Pursuant to A.R.S. § 14 - 5651
Coventry, Vernon, & Roberts, LLC holds an active Fiduciary License (No. 20470), issued by the Arizona Supreme Court Administrative Offices of the Court, and is subject to regulation by the 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 at:

<http://www.azcourts.gov/cld/FiduciaryLicensingProgram.aspx>

<http://www.lawforseniors.org/>

Email to PFP@courts.az.gov

Phone: (602) 452-3378

- 5) **Veterans** are eligible for a **10% discount** on all fiduciary services (not retroactive; some restrictions apply).