



Rates and Fees

Packaged Services

Initial Evaluation and Recommendations	\$230.00
Evaluation of individual client or family needs. Written recommendations provided by email. Includes travel time and mileage to your location. (See Expenses, below.)	
Just In Case Plan ^(SM)	\$230.00
Establish authority for care management and fiduciary services before you need them. Build a relationship with your Just In Case Team so that your team can carry out your wishes. Name decision-makers for health care advocate, financial manager, trustee, and estate administrator. Package includes coordination with other professionals, information intake, and document review.	
Spouse or partner in the same household	\$150.00

Hourly Rates

Fiduciary Services	\$115.00
Agent under Power of Attorney, Trustee, Conservator, Guardian, Health Care Representative, Estate Representative, Household Money Manager.	
Care Management Services	\$105.00
Care team coordination, family consultations, needs assessments, move planning, vacation monitoring, and other similar services.	
Support Services	\$60.00 - \$95.00
Clerk, Fiduciary Aide, Care Manager Assistant, Banking, Checkbook reconciliation	

Expenses

Travel time and mileage for the Initial Evaluation package includes destinations within the Eugene-Springfield metropolitan area. Additional travel time may apply for other locations. For hourly-rate services, travel time is charged for all necessary travel, and mileage is charged at the Federal rate. Other costs advanced or direct expenses will be billed to the client.

Photocopies, scans, and faxes are charged at \$0.12 per image. Postage is charged at exact cost. For hourly services, we charge per 1/10th of an hour and send monthly invoices for fees and expenses incurred. We may ask for an advance deposit for services depending on the situation. In Conservatorship and Guardianship cases, invoices are paid only upon court approval. After-hours rates apply at time-and-one-half the usual rate for unplanned calls and services before 8:00 a.m. or after 5:00 p.m. on regular work days. Special rates may be applied for unique circumstances. Credit cards are accepted with 4% courtesy fee added. Rates are subject to reasonable periodic increases.