



Rates and Fees

Initial phone or office consultation, 20 minutes

Our gift to you

Packaged Services

Initial Evaluation and Recommendations \$210.00

Evaluation of individual client or family needs, at your home or our office.

Travel time* and mileage included. Written recommendations delivered at time of service.

Decision-Maker Planning \$195.00

Planning for POA, Health Care Representative, Trustee, Personal Representative, etc.

Includes consultation, coordination with other involved professionals, and document review.

Just In Case^(SM) Plan \$195.00

Includes a consultation and relationship set-up. 2nd person is an additional \$125.00

Hourly Rates

Fiduciary Services \$115.00

Agent under Power of Attorney, Trustee, Conservator, Guardian,
Estate Representative, Household Money Management.

Care Management Services \$105.00

Consultations about care needs and living situation; overall care planning; care team coordination; health-care advocacy; service as Health Care Representative (also called Health Care POA); vacation monitoring, and related services.

Support Services \$60.00 - \$90.00

Clerk, Fiduciary Aide, Care Manager Assistant

Special rates may apply in unique circumstances. Combination of Just In Case + Estate planning, \$295.00

*Travel time 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.

Mileage is charged at the Federal rate.

Photocopies \$0.10 per black/white page, \$1.00 per full-color page; Faxes, scan-and-send \$1.00 per page; Postage at exact cost. Credit cards accepted with 4% courtesy fee added.

For hourly rates, we charge per 1/10th of an hour and send bills monthly for fees and expenses incurred, except that Conservatorship and Guardianship invoices are submitted annually to the court for review and approval. We may ask for an advance deposit for services depending on the situation. After-hours rates apply at time-and-one-half outside regular business hours (regular hours are 8:00 a.m. to 5:00 p.m. on regular work days). Rates are subject to reasonable periodic increases.

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