



## Rates and Fees

### *Packaged Services*

**Initial Evaluation and Recommendations- Basic (3 hours) \$300.00**

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.  
Additional time billed at our applicable hourly rate(s).

**Just In Case<sup>(SM)</sup> Plan, Decision Maker Planning (4-5 hours) \$400.00**

Set up plans in advance for care management and financial services.  
Build a relationship with your Just in Case team so that we can carry out your wishes.  
Name decision makers for health care advocate, financial manager, trustee, and estate administrator. Includes consultations, document review, document custody, and establishment of fiduciary relationship.

Second person (spouse, partner, etc.) included in planning. \$195.00

### *Hourly Rates*

**Fiduciary Services \$125.00**

Fiduciary services include service as, or in performance of duties required for:  
Agent under power of attorney, Trustee, Conservator, Guardian, Estate Representative,  
Household Money Manager, Health Care Representative (Health Care POA), or other  
duly appointed surrogate decision maker.

Associate Fiduciary \$110.00

**Care Management Services \$110.00**

Consultations about care needs and living situation, move planning, and placement  
Services. Overall care planning, care team coordination, health-care advocacy, vacation  
monitoring, and related services are also included.

Assistant Care Manager \$95.00

**Fiduciary Aide/Support Services \$45-\$95.00**

Client Service Specialist/Bookkeeper, \$85; Fiduciary Aide, \$85; Admin support, \$75  
Special services (property services, various special projects) and interns, \$45 - \$95

Initial phone or office consultation, 20 minutes, *Complimentary*. Special rates may apply in unique circumstances.

\*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. Other costs advanced and direct expenses will be billed to the client at the hourly rate.

Maintenance fee of \$12/month applies to all active cases. Photocopies, scans and faxes are charged at \$0.14 per image. Postage at exact cost. Credit cards accepted with 4% courtesy fee added. For hourly services, we charge per 1/10<sup>th</sup> of an hour and send bills monthly for fees and expenses incurred, except that Conservatorship and Guardianship invoices are submitted annually for court 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.

For 2023

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