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**GUARDIANSHIP, CONSERVATORSHIP, TRUST AND ESTATES
FEE SCHEDULE
Effective: February 1, 2025**

INCEPTION FEE

A 1% Inception Fee will be charged to Guardianship, Conservatorship, Trust and/or Estate cases. Upon opening the client's Guardianship, Conservatorship, Trust and/or Estate case, Maximum Legal Services ("MaxCorp") will collect a one percent (1%) Inception Fee based on the highest gross fair market value of the client's assets at any point during the first 365 days following the opening of the case. Assets will include the value of any real property in the Guardianship, Conservatorship, Trust and/or Estate case. MaxCorp will employ a reasonable method to determine the value of real property.

The 1% Inception Fee will also be assessed on new assets received within the 365 days of opening the case. A minimum fee of \$600.00 may be assessed for the initial inception fee. No retainer fees will be required unless discussed and determined otherwise by agreement with the Executive Director.

In case-specific circumstances when MaxCorp is requested to provide limited services, the 1% Inception Fee may be waived and the case will be charged on an hourly basis in accordance with this Fee Schedule. Any waiver of the 1% Inception Fee in these circumstances will be discussed and determined by agreement with the Executive Director.

ADMINISTRATION FEE

Although allowed by law, MaxCorp will waive administration fees unless discussed and determined otherwise by agreement with the Executive Director.

TERMINATION FEE

Upon termination of the Trust, Estate, Conservatorship, or Guardianship, MaxCorp will collect a one percent (1%) Termination Fee based upon the gross fair market value of the highest value of assets within 365 days from the termination date of the case. The Termination Fee will be payable to MaxCorp at any time after the termination date, up to and including the date the assets are finally distributed.

MAXCORP FEES

Fees will be charged for work performed by MaxCorp, as follows:

Attorney/Fiduciary Rate	\$320.00 per hour
Paralegal/Legal Assistant Rate	\$190.00 per hour
Fiduciary Accountant Rate	\$190.00 per hour
Social Worker Rate	\$160.00 per hour
Account Manager/Bookkeeper Rate	\$130.00 per hour

MaxCorp workers and any other special service fees will be billed to the account as incurred, not less than monthly.

AFTER-HOURS FEE

Additional fees may apply for work performed outside of regular business hours (Monday–Friday, 8:30 AM–5:00 PM, excluding holidays). These fees will be billed at an adjusted rate.

SPECIAL SERVICE FEES, COSTS AND EXPENSES

Further fees and compensation may be charged for reasonable services performed in connection with the guardianship, conservatorship, estate, or trust such as sales or leases of real estate, contested or litigated claims against the estate or trust, adjustment and payment of extensive or complicated estate or inheritance taxes, the preparation of estate and income tax returns, management of estate or trust businesses, 1099 tax preparation, and such other special services as may be necessary for MaxCorp to maintain, perform, prosecute, or defend on behalf of the trust, estate, conservatorship, or guardianship.

Other reasonable costs and expenses incurred by MaxCorp on behalf of and chargeable to the estate or trust account shall include but not be limited to deposit account charges, long-distance charges, wire charges, brokerage account charges, postage (regular, express, certified, special delivery, insured, etc.), photocopies, processing Medicare and VA claims, payment of bills, appraisal fees, etc. Costs and expenses will be charged to the account upon accrual.

SPECIALTY SERVICES

Vendors, including but not limited to the following, may be hired on behalf of and chargeable to the guardianship, conservatorship, or trust estate for their services, at MaxCorp's discretion:

- Attorney
- Realtor/Broker
- Certified Public Accountant/Tax Preparer
- Building Contractor
- Social Worker
- Handy-Man
- Cleaning Services
- Caregiver
- Educational Services

PREPARATION AND FILING OF FIDUCIARY TAX RETURN FEE

When MaxCorp serves as a Guardian, Conservator, Trust, and/or Estate, MaxCorp will have the personal and/or fiduciary income tax return prepared and filed. The charge for the preparation and filing of any General Excise Taxes, tax returns, or other taxes will be made at the hourly rate of the tax preparer performing the service. Unless notified otherwise by the settlor, MaxCorp will select the tax preparer.

When MaxCorp serves as co-signer of a Guardianship, Conservatorship, Trust, and/or Estate account, MaxCorp will not prepare or file income tax returns but will forward relevant financial data, such as Form 1099, to the Guardian, Conservator, Trustee, and/or Agent.

OTHER

MaxCorp may assist in the preparation of applications for Medicaid, SSI, or other government assistance program eligibility forms. MaxCorp fees will be charged as noted above.

The Executive Director is authorized to adjust fees and schedules on a per-case basis, as appropriate. Pro-bono and low-bono services are available for those who cannot afford the full fee schedule.

MaxCorp is a 501(c)(3) non-profit organization and does not charge State of Hawai'i General Excise Tax on its fees.

This Fee Schedule, effective February 1, 2025, may be periodically reviewed and adjusted from time to time without notice.