

Michael Polier CLPF, NCG, CDP

Trustee | Fiduciary | Advisor



Experienced Trustee

Licensed Fiduciary

National Certified Guardian

Certified Dementia Practitioner

About

Polier Fiduciary provides trusted, transparent, and client-focused fiduciary services rooted in years of experience across trust administration, estate settlement, family office advisory, and business management. Michael has overseen complex and high net worth estates, guided families through sensitive transitions, and worked alongside attorneys, CPAs, and medical professionals to ensure that personal and financial affairs are handled with precision and care. His practice is built on communication, transparency, and empathy—balancing the technical requirements of fiduciary work with the human dynamics that shape every family.

“Michael’s firm and trustworthy hand on the tiller during a stormy period in my patient’s life made everything markedly easier for the entire family!”

— Dr. Brandon Koretz, MD, MBA,
Chair in Geriatric Medicine, UCLA

“Michael’s conversations with our family ranged from sensitive personal issues to a broad range of challenging estate and financial matters. At all times, Michael exhibits an unwavering commitment to resolving complex situations with highest good for all in mind.”

— Former Client & Beneficiary

Experience

Over 10 Years of Experience:

- Manage / Oversee Financial Planners & Wealth Managers
- Business Management, Advisory, & Operations
- Manage / Oversee Trust Accounting & Taxes
- Assets / Heirlooms Inventory & Distribution
- Manage / Oversee End of Life Care, Medical & Caregivers
- Real Estate Oversight, Management, & Sales

My experience began with a grantor who developed vascular dementia and who was no longer able to manage his businesses and finances. I stepped in to manage his end of life care, businesses, finances and investments including the Bernie Madoff claw-back. I managed and scheduled his caregivers and numerous doctor appointments. This Grantor developed severe dementia over time and, every step of the way, I endeavored to help him to enjoy a high quality of life.

To further illustrate my experience, another client also developed dementia and was deemed to no longer have capacity to manage his businesses, finances and medical care. Additionally, there was great acrimony among his beneficiaries, cases of elder abuse (both physical and financial), and a mountain of business and tax related work that needed to be done at a high level. I stepped in and immediately got to work ensuring the Grantor's safety while protecting assets, businesses and property. I did this while being collaborative and communicative with beneficiaries and stakeholders.

The Grantor's children and loved ones were able to hold his hand, in the end, when he passed in a safe and nurturing environment with their estate protected and thriving.

Services

End of Life Care

Management, oversight & advisory for at-home care, facility care, caregiving staff, medical teams, and supportive programming.

Estate Inventory

I handle everything from inventory & appraisals to beneficiary distributions, sales, and donations.

Beneficiary & Stakeholder Management

I take a highly communicative and inclusive approach, ensuring that everyone's needs are being addressed and facilitated with empathy and understanding.

Trust Administration

I bring years of experience handling complex estates, ensuring seamless administration while upholding the grantor's wishes and facilitating beneficiary needs.

Business Management

I step in to help run—and in some cases wind down—businesses, including M&A, reorganizing, board development, asset management, and operations.

Fiduciary Services

I ensure that financial and legal matters are managed ethically, efficiently, and in strict accordance with the terms of the trust and applicable laws.

Conservator of the Person / Estate

I protect and manage the personal care or finances—or both—of a person who has been found by a judge or a jury to be unable to manage their own affairs.

Limited & Temporary Conservatorships

I step in and take care of a conservatee's immediate and urgent needs until a general or limited conservator is appointed.

Philanthropic Advisory

I work with trusts, family offices, and beneficiaries to help donors define their charitable goals and develop a plan to achieve them.

Credentials

- Licensed California Professional Fiduciary (CLPF)
- National Certified Guardian (NCG)
- Certified Dementia Practitioner (CDP)
- Member, Professional Fiduciary Association of California (PFAC)
- Background in trust & estate administration, family office advisory, and financial stewardship
 - Founder of Polier Fiduciary (www.polierfiduciary.com)
 - LinkedIn: <https://www.linkedin.com/in/michaelpolier/>

Fee Schedule

Polier Trust & Fiduciary provides professional, transparent, and court-compliant fiduciary services. Fees are aligned with California Probate Code and industry standards, and may be subject to court approval when required. Fees are negotiable and determined on a sliding scale, depending on the value of the estate and the complexity of administration.

- **Client Set-Up Fee**
 - \$3,500 — One-time flat fee for client intake and set-up
- **Percentage-Based Fees**
 - 0.25% – 1.5% per annum, based on the value of the trust. This annual fee applies only to ongoing trustee services (e.g., investment oversight, distributions, recordkeeping, and reporting). It is intended as an alternative to hourly billing for standard trustee duties. Extraordinary services are billed separately on an hourly basis.

- **Hourly Rates**

- Professional Fiduciary / Conservator / Guardian / Agent under POA: \$250 – \$400 per hour
- Support staff: \$120 – \$190 per hour
- Time is billed in increments of one-tenth (0.1) of an hour. Hourly billing applies in matters where a percentage fee is not appropriate, such as conservatorships, powers of attorney, or discrete fiduciary tasks.
- Hourly billing may also apply in addition to a percentage fee when handling extraordinary services beyond routine trustee duties (e.g., litigation, real estate sales, contested matters).
- Extraordinary Services (XO Fees)
 - Extraordinary services are non-routine matters requiring significant expertise or time beyond standard administration. These are billed in addition to percentage-based or hourly trustee fees, and may include litigation, complex tax issues, real estate transactions, business operations, or family disputes.

- **Post-Death Administration**

- Every estate and trust is unique, and there is no “one size fits all” approach to post-death administration. Fees for these services are determined on a case-by-case basis, taking into account the complexity of the trust, the needs of the beneficiaries, and the scope of administration required. I apply a fair sliding scale and may use percentage-based or hourly billing, as appropriate, to ensure that fees reflect the actual work involved.

All fees are subject to approval by the court when required under California law.

Contact

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