

Deborah Y. Lee, CLPF

Foster City, CA • (650) 464-4164 • Debbie@LeeFiduciary.com

A note to my prospective client:

Allow me to share a bit about myself...

More fulfilling than engineering - My 13 years as an engineer and supervisor at Ford Motor Company brought me great satisfaction. But there's something special about being a professional fiduciary. There's nothing quite like the satisfaction of easing my client's worries. Building a friendly and trusting relationship, tending to their affairs, and untangling complex problems. It's what makes my job so gratifying on a personal level.

Striving for excellence has always been my focus - Drawing from my immigrant family upbringing and engineering background, I've learned that every challenge requires problem-solving, attention to detail and a tailored approach. Through dedication and unwavering focus, I've demonstrated that hard work and intellect are the keys to success. This is what I enjoy providing my clients. **It's been a rewarding profession since 2012!**

What matters most to me is you - I'll tailor my approach to your wishes, treating you with compassion, dignity, and respect. That's my promise.

Thank you for your consideration!

Warmly,

Debbie Lee

California Licensed Professional Fiduciary

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Biography

Childhood to College: From Chinese immigrant parents, working the family restaurant to engineering acceptance at the University of Michigan - Debbie's strong work ethic is rooted in her upbringing by Chinese immigrant parents. Arriving in the US with limited resources and education, her parents initially took on menial jobs before establishing a successful restaurant business. Raised in a family where all eleven children contributed to the restaurant's operations, they learned the value of hard work from a young age while balancing academics. Despite the challenges, each child pursued a college education, with four becoming physicians in various specialties, while Debbie pursued her passion for problem-solving in engineering.

Professional Success, Marriage, and Parenthood - During her tenure at Ford Motor Company spanning 13 years, Debbie held various positions, beginning as a mechanical engineer specializing in brake components. She later transitioned to roles in Business Development and ultimately earned a promotion to Chief Program Analyst Supervisor. Following her successful professional journey, Debbie made the deliberate choice to become a full-time stay-at-home parent for 12 years. This decision was rooted in her unwavering commitment to excellence in parenting, with the goal of fostering happiness, security, confidence, and success in her two sons. This period coincided with her husband's career pursuit in the tech industry as an engineer and program manager.

Debbie's actions against financial abuse of relative led to professional fiduciary career - In 2006, while raising her sons, Debbie intervened in a case of financial exploitation affecting a family member suffering from dementia. Working alongside other relatives and legal counsel, they successfully safeguarded the elderly gentleman's life savings from exploitation. Subsequently, Debbie assumed the responsibility of advocating for and managing his health, financial, legal, and personal affairs for 8 years until his passing. This experience marked her initial entry into fiduciary duties. In 2012, with her sons in middle school, she transitioned into her new career as a professional fiduciary, completing college coursework and obtaining licensure from the State of California.

Experience as a Fiduciary since 2012, the journey continues - Since 2012, Debbie has found great fulfillment as a professional fiduciary, efficiently handling both simple and complex cases. Her engineering problem-solving skills and attention to detail are particularly evident in navigating intricate legal, financial and tax matters, challenging family dynamics, and dealing with unscrupulous parties. Debbie's high level of intelligence, psychological insight, expertise, and life experience uniquely qualify her for this role. She takes pride in safeguarding her clients from malicious actions and enhancing the level of care they receive.

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PRIVATE PROFESSIONAL FIDUCIARY

A friendly and caring Professional Fiduciary advocating on behalf of the client. A former engineer and graduate of the University of Michigan with strong analytical and organizational skills to manage any complex situation.

- California Licensed Professional Fiduciary #650
- National Certified Guardian
- Excellent interpersonal skills
- Strong communication skills
- Accurate and disciplined
- Project management experience

Software & technical skills/experience: MS Office (Word, Excel, PowerPoint, Outlook), Quicken

HIGHLIGHTS

- Successfully defended decedent's multi-million dollar estate from former spouse legally divorced 30+ years seeking to invalidate divorce.
- Resolved a will contest among 5 beneficiaries after discovering a handwritten will in decedent's home.
- Successfully amended conservatee's trust documents to remove former caregiver as sole beneficiary.
- Developed a plan with a Pulmonologist to eliminate a medication that caused undesirable side effects.
- Discovered opportunity to retroactively increase social security benefits tied to a retirement benefit.

PROFESSIONAL EXPERIENCE

LEE FIDUCIARY SERVICES | Foster City, CA

2012 - Present

Professional Fiduciary

- Licensed and started practice in November 2012. Cases have involved:
 - Trust Administration
 - Probate / Estate Administration
 - Conservatorship of the Estate and Person
 - Power of Attorney for Finances and Health Care

Non-Professional Fiduciary | Foster City, CA

2006 - 2014

- Managed the person and estate of a conserved elderly family member with dementia.

FORD MOTOR COMPANY | Dearborn, MI

1987 - 2000

Chief Program Analyst, Supervisor

- Provided program organization and leadership for the 2003 Windstar minivan program.

Business Development Planning Analyst

- Developed a business plan and pursued new business opportunities for automotive components.
- Led cross-functional team with engineering, advanced manufacturing, finance and purchasing.

Product Design Mechanical Engineer

- Successfully redesigned and implemented an improved brake tube system resulting in 35% brake tube leak warranty reduction.
- Effectively resolved all design and assembly issues as they surfaced in timely support of each functional build phase at the Oakville Assembly Plant.

EDUCATION, CERTIFICATIONS and PROFESSIONAL AFFILIATIONS

B.S. in Mechanical Engineering | University of Michigan | Ann Arbor, MI

1987

Certificate in Prof. Fiduciary Management for Conservators | California State University | Fullerton, CA

2011

Certificate in Prof. Fiduciary Management for Trustees | California State University | Fullerton, CA

2012

Professional Fiduciary Association of California, General Member

2013

San Mateo County Bar Association, Associate Member

2013

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LEE FIDUCIARY SERVICES Schedule of Fees

Fiduciary Services – Base Rate	\$225 per hour
Fiduciary Services – Complex Rate	\$295+ per hour

Fees, Costs and Billing

- Services are billed in increments of one-tenth of an hour.
- All time expended for client's benefit is billed including but not limited to client visits, telephone calls, email or text communications, meetings, document preparation or review, research, court attendance, and travel.
- Complex rate includes services such as litigation, contested matters, tax matters, real estate transactions and after-hours/weekend/holiday work.
- Fees are invoiced monthly and paid from client funds.
- Fees for conservatorship and decedent estate matters are paid upon court approval. Conservatorships will be billed for periodic payments on account as determined by the court.
- Outside professional services such as legal, financial or health related may be contracted as needed and are paid directly from client funds as deemed necessary by the Fiduciary, with court approval if required.
- Out-of-pocket costs and expenses incurred will be itemized and charged back to client for reimbursement, including but not limited to court costs, travel costs, delivery fees, extraordinary reproduction services, parking fees, toll charges and other costs associated with administering the trust or estate.
- All fees are negotiable and rates are subject to change with reasonable and required notice.