



**Professional Fiduciaries Bureau**  
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## **Professional Fiduciaries Bureau (Bureau) Advisory Committee Meeting**

**Wednesday May 20, 2015  
10:00a.m. – 1:00p.m. or conclusion**

**Meeting Location:  
Department of Consumer Affairs (DCA) – HQ1  
1625 N. Market Boulevard, 1<sup>st</sup> Floor Hearing Room  
Sacramento, CA 95834**

### **Committee Members**

Barbara de Vries, Chair  
Aileen Federizo, Vice Chair  
Hang Le To  
Kathleen Thomson  
Jenny Chacon  
Marguerite Lorenz

Webcast\*

- 1) Call to Order – Barbara de Vries, Chair
- 2) Roll Call & Establishment of Quorum – Julia Ansel, Bureau Chief
- 3) Introductions
- 4) Professional Fiduciaries Bureau Mission Statement – Julia Ansel, Bureau Chief
- 5) Approval of the Advisory Committee Meeting Minutes from February 4, 2015
- 6) Updates from the Director's Office – DCA Executive Staff
- 7) Budget Report – DCA Budget Analyst
  - Budget Overview and Update
- 8) Legislative Update – DCA Legislative Analyst
  - Legislative Process Overview
  - Legislation Impacting the Bureau
    - AB 436
    - SB 155
    - SB 269
    - SB 589
  - Legislation Impacting All DCA Licensing Programs

-AB 12  
-AB 750  
-AB 1060  
-SB 467

9) Continuing Education Audit – Angela Bigelow, Program Analyst

10) Bureau Update – Julia Ansel, Bureau Chief

- Statistics
- E-Newsletter
- Outreach Update
- Professional Fiduciary Association of California Conference Update
- PFB Survey Update
- General Bureau Updates

11) Discussion Pre-licensing Segmentation – Julia Ansel, Bureau Chief

12) Future Agenda Items

13) Future Meeting Dates

14) Public Comment on Items Not on the Agenda (See “**Note**” below)

15) Adjournment

**Please note:** In accordance with the Bagley-Keene Open Meeting Act, all meetings of the Board are open to the public. Government Code Section 11125.7 provides the opportunity for the public to address each agenda item during discussion or consideration. The public can participate in the discussion of any item on this agenda. If the committee does not offer public comment before going on to the next agenda item, the public may request the floor at the start of the next agenda item to comment on a prior agenda item.

**Note:** The Professional Fiduciaries Bureau Advisory Committee may take action on any of the above agenda items; however the committee may not discuss or take action on any matter raised that is not included in this agenda. The Committee may, however, decide to place the matter on the agenda of a future meeting.

**Notice:** The meeting is accessible to persons with disabilities. A person who needs accommodations or modifications in order to participate in the meeting should make a request no later than five working days before the meeting to the Bureau by contacting Angela Bigelow at (916) 574-7341, [angela.bigelow@dca.ca.gov](mailto:angela.bigelow@dca.ca.gov) or by sending a written request to the Professional Fiduciaries Bureau, 1625 North Market Blvd., Ste. S-209, Sacramento, California 95834.

Requests for further information should be directed to Ms. Bigelow at the same address and telephone number.

\*The Bureau plans to webcast this meeting on its website at [www.fiduciary.ca.gov](http://www.fiduciary.ca.gov). Webcast availability cannot, however, be guaranteed due to limitations on resources. If you wish to participate or to have a guaranteed opportunity to observe, please plan to attend at a physical location.