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CALIFORNIA PROFESSIONAL FIDUCIARY LICENSING ADVISORY

July 1, 2008

Dear Professional Fiduciary:

As Chief of the Professional Fiduciaries Bureau (Bureau) within the California Department of Consumer Affairs, it is my privilege to implement the new licensing program for professional fiduciaries. The licensing program creates a new standard for professionals and provides more protection for consumers. As a professional fiduciary you provide a valuable consumer service and I look forward to working with you on these objectives.

This advisory is to inform you of the new licensing mandates. As of July 1, 2008, the court is prohibited from appointing you to carry out the duties of a professional fiduciary unless you hold a valid license issued by the Bureau pursuant to Chapter 6 (commencing with Section 6500) of Division 3 of the Business and Professions Code (Probate Code Section 2340). Otherwise, the general deadline for licensure as a professional fiduciary is January 1, 2009 (Business and Professions Code Section 6530(a); Probate Code Section 60.1(b)). Noncompliance with these provisions is a violation of the law.

To become licensed you must submit a complete licensing application package to the Bureau. This requires you to complete the application form, fulfill the education/experience requirements, earn 30 hours of pre-licensing education credit, pass a criminal background check, and pass an examination for qualification.

To download an application package or to learn more about licensing, please visit our website at www.fiduciary.ca.gov or contact us directly at (916) 574-7340.

Sincerely,
Mellonie Yang, Chief
Professional Fiduciaries Bureau