

**Professional Fiduciaries Bureau**  
Post Office Box 989005  
West Sacramento, CA 95798-9005  
Telephone: (916) 574-7340 FAX (916) 574-8645  
Website: [www.fiduciary.ca.gov](http://www.fiduciary.ca.gov)



## **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 item; 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.

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**Professional Fiduciaries Bureau (Bureau)  
Advisory Committee Meeting  
Wednesday, February 4, 2015  
Meeting Minutes**

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

**Committee Members Present**

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

**DCA Staff Present**

Julia Ansel, Bureau Chief  
Jenny Turner, Licensing Analyst  
Angelique Scott, DCA Legal Counsel

- 1) Call to Order – Ms. Marguerite Lorenz called the meeting to order at 10:30 a.m.
- 2) Roll Call – Ms. Julia Ansel, Bureau Chief called roll. There were six members present one vacant position and a quorum was established.
- 3) Introductions – Each member introduced themselves. Ms. Ansel welcomed Jenny Chacon, the newest Committee Member. Ms. Ansel stated with AB 2720 passing on January 1, 2015, all votes would be taken by roll call on items that require action. The meeting started with Ms. Ansel reading the Professional Fiduciaries Bureau (Bureau) mission statement.
- 4) Approval of the Advisory Committee Meeting Minutes from November 18, 2014 – Ms. Kathleen Thomson motioned to approve the minutes as written, Ms. Aileen Federizo seconded the motion, with a vote by roll call all were in favor, none were opposed, and the motion carried.  
Public Comment: None.
- 5) Updates from the Director's Office – DCA Deputy Director of Board and Bureau Relations Christine Lally reviewed training required to be completed by all Committee Members. Board Member Orientation Training is to be completed within one year of appointment and re-appointment. This training will be held March 18, 2015 in Sacramento, June 18, 2015 in southern California, and on a date to be determined in September 2015 in the bay area. Ethics training is to be completed within six months of appointment and repeated every two years. This is a two-hour on-line training. Sexual Harassment Prevention Training is required to be taken every odd

1 year and is provided as a webinar or in a classroom setting. Defensive driver training is an on-line  
2 training and is required to be completed every four years.

3 Lastly, the deadline to turn in the Form 700 is April 1 of each year. Each Committee Member is  
4 required to complete this form within 30 days of appointment, annually, and when leaving office.

5 Public Comment: None.

6  
7 6) Budget Report – Mr. Tommy Nhan, DCA Budget Analyst presented the current budget for the  
8 Fiscal Year 14/15 and Budget Year 15/16. Next year the Bureau Chief position will be increased  
9 to a full-time position. The current year budget was set at \$610,637 and it is projected the Bureau  
10 will spend \$607,915 which leaves a reversion of \$2,722 or .4%. The estimated revenue was set  
11 at \$501,000 and is projected to be \$546,065. The Bureau's budget is always close, so the budget  
12 office and the Bureau Chief work closely to stay on track.

13 Public Comment: None.

14  
15 7) Legislative Update – Mr. Scott Allen, DCA Legislative Analyst presented on the following bills:  
16 • Legislation Impacting the Bureau – Mr. Allen stated there have been no changes to any of  
17 the bills since the Bureau's last meeting.  
18 • Legislation Impacting All DCA Licensing Programs  
19 1. AB 809 only affects the Healing Arts Boards  
20 2. AB 1702 prohibits a licensing agency from denying a license based solely on an  
21 applicant completing the requirements for licensing while incarcerated.

22  
23 Ms. Lorenz asked if a license could be denied due to the crime? Ms. Scott answered, yes, but the  
24 applicant cannot be denied based solely on the education being acquired while the applicant is  
25 incarcerated.

- 26 3. AB 1711 requires state agencies to include an economic impact assessment in its  
27 published initial statement of reasons document for all proposed regulations. The  
28 bill also requires the Department of Finance to provide, and periodically update,  
29 instructions on how to prepare the economic impact assessment, which will be  
30 placed in the State Administrative Manual.  
31 4. AB 2396 prohibits a licensing authority under the Department from denying a  
32 license based solely on a prior conviction if the conviction has been dismissed  
33 pursuant to Penal Code expungement procedures.  
34 5. AB 2720 amends the Bagley-Keene Open Act to require all state bodies, including  
35 all licensing programs within the Department, to keep a record of, and publicly  
36 report, every vote and abstention of each voting member on every action taken by  
37 a board, committee, or commission.  
38 6. SB 1159 requires all programs within the Department to accept an individual  
39 taxpayer identification number (ITIN) from applicants in lieu of a social security  
40 number (SSN) and explicitly directs the Department's licensing programs to issue  
41 licenses to individuals qualified for licensure but are not legally present in the  
42 United States.

43 Ms. Federizo asked does this allow an ITIN to be used in lieu of the SSN? Ms. Scott answered  
44 according to Business and Professions Code section 30 individuals can provide either an ITIN or  
45 SSN.

- 46 7. SB 1226 requires programs under the Department to expedite the licensure  
47 process for individuals honorably discharged from the United States Armed Forces  
48 and allows a program to assist the licensure process for these individuals.  
49 8. SB 1243 makes a number of changes: 1) allows a program to provide a meeting  
50 notice by regular mail, email, or both. 2) requires any program that intends to  
51 webcast a meeting, indicate on the meeting notice it will be webcasted. 3) extends

1 current telephone disconnect authority from specific Department programs to all  
 2 programs. 4) requires the Department to annually report additional enforcement  
 3 statistics to the Legislature.

4 Ms. Ansel asked Mr. Allen to explain this bill further. Mr. Allen explained if a licensee is found to have  
 5 advertised to offer services and is unlicensed; the program can contact the Public Utilities  
 6 Commission to have the number disconnected.

7 9. SB 1256 requires all healing arts licensees to present patients with a specified  
 8 notice and treatment plan that includes estimated costs and items to be pre-paid  
 9 prior to facilitating a third-party line of credit for payment of medical expenses. The  
 10 bill also forbids the arrangement of such a credit plan with a patient that is under  
 11 the influence of anesthesia.

12 Public Comment: Mr. Jerry Desmond would like the record to reflect the Professional Fiduciary  
 13 Association of California (PFAC) was in support of AB 2741 and AB 2024.

14  
 15 8) Bureau Update –

- 16 • Statistics – Ms. Ansel presented the statistics for this Fiscal Year (FY) through  
 17 December 31, 2014 as follows and compared to the same timeframe last Fiscal Year  
 18 through December 31, 2013:

Type	FY 13/14 (Dec 2013)	FY 14/15 (Dec 2014)	FY 14/15 (Jan 2015)
Licenses Issued	42	37	
Active Licenses	628	648	654
Total Licenses Issued	751	816	822
Complaints Received	54	81	
Complaints Closed	55	33	
Complaints Pending	26	83	91
Average Days to Close Complaint	87	82	120 (still under target Of 180 days)
Accusations	0	1	
Citations	2	2	

19  
 20 Ms. Federizo asked if the Bureau staff asks callers how they heard about the Bureau and Ms. Ansel  
 21 answered this is something the Bureau may start doing.

- 22 • E-Newsletter – The Bureau is hoping to get the winter/spring edition out in March 2015  
 23 and is still accepting articles for the upcoming edition.
- 24 • Strategic Plan
  - 25 1. Update on Bureau's Completed Items – The Strategic Plan is posted on the  
 26 Bureau's website. The Bureau has completed the following items: 1) AB 2024  
 27 passed and the Bureau can now work on regulations for retired and cancelled  
 28 license statuses. 2) Item 2.2 has been completed with the hire of a full-time  
 29 enforcement analyst. 3) Item 2.3 has been completed with a link on the website to  
 30 the definition of mandated reporting and how to provide a report. 4) The Bureau is  
 31 working on the disciplinary guidelines. 5) Media opportunities – the Bureau is now  
 32 on Facebook and Twitter and attending Senior Scam Stoppers in the area. 6)  
 33 Item 4.1 standardize prelicensing education – the Education Subcommittee has  
 34 submitted a proposal to the Bureau Chief for consideration.
  - 35 2. Ms. Ansel asked that if any of the Committee Members have updates to please let  
 36 the Bureau know.
- 37 • Collect Citation \$ through Franchise Tax Board (FTB) – Ms. Ansel informed the Committee  
 38 there is a program through the FTB called Intercept which some Boards and Bureaus use  
 39 to collect fines owed through the licensees tax refund payment. The Bureau is not

1 planning to use this service at this time as there is no issue in the collection of fines for the  
2 Bureau.

3 Public Comment: None.

4  
5 9) Bureau's New Publications – Ms. Ansel presented two new brochures one for licensees and a  
6 checklist for consumers to use when interviewing to hire a fiduciary.

7 Public Comment: None.

8  
9 11:35-11:45 – Break

10  
11 10) Continuing Education (CE) Report – Ms. Ansel reported the Bureau can educate licensees about  
12 CE requirements through the e-newsletter, interested parties list, and the home page of the  
13 Bureau's website. The annual CE audit is coming up and the Bureau will be sending letters to  
14 approximately 5% of the licensing population.

15 Public Comment: Ms. Bessey stated PFAC proposed to require PFAC Members to take a certain  
16 number of hours in specific topics and the proposal was voted down. PFAC would like to see the  
17 Bureau change the requirements.

18  
19 11) Review Suggestions on Pre-licensing Segmentation – Ms. Ansel presented an outline of the  
20 Education Sub-Committee combined recommendation with the recommended four categories of  
21 study and subtopics within each of those categories. It was suggested if the Bureau does not go  
22 ahead with regulations to segment the hours, that this list be used as a recommendation to  
23 applicants and licensees of classes that should be taken to satisfy education requirements. The  
24 following changes were recommend during the discussion:

- 25 Introduction to Being a Fiduciary and Best Practices  
26 Change "Developing systems and practices in your office" to "Developing standards of practice,  
27 internal controls, accounting systems, and record keeping"  
28 Change "Bonding" to "Bonding and Professional Liability Insurance"  
29 Services Dealing with the Person  
30 Change "Hiring case managers" to "Hiring case managers and other vendors"  
31 Services Dealing with Finances  
32 Change "Basics of Estate Management" to "Basics of Estate/Probate Administration"  
33 Understanding Public Benefits  
34 No Changes

35 Public Comment – Ms. Bessey suggested adding, "Developing a Business Model" to the Introduction  
36 section.

37 Ms. Ansel will make these edits and review with Ms. de Vries and talk with DCA staff and report back  
38 to the Advisory Committee Members.

- 39  
40 12) Committee Elections
- 41 • Chair – Ms. Thomson nominated Ms. de Vries, Ms. Aileen Federizo seconded the motion,  
42 with a vote by roll call, all were in favor, none were opposed, and the motion carried.
  - 43 • Vice Chair – Ms. de Vries nominated Ms. Federizo, Ms. To seconded the motion, with a  
44 vote by roll call, all were in favor, none were opposed, and the motion carried.

45 Public Comment: None.

- 46  
47 13) Future Agenda Items
- 48 -Posting education segmentation document as a recommendation on the Bureau's website.
  - 49 -Outreach

50 Public Comment – None

51

- 1 14) Future Meeting Dates
- 2 -May 6, 2015 may be changed as the new Committee Chair cannot attend this date.
- 3 -August 19, 2015, or November 18, 2015, may be moved to Southern California.
- 4
- 5 15) Public Comment on Items Not on the Agenda – None.
- 6
- 7 16) Adjournment – The meeting was adjourned at 12:42p.m.

# 3108 - Professional Fiduciaries Bureau Analysis of Fund Condition

Prepared 5/18/2015

(Dollars in Thousands)

Gov's Budget FY 2015-16 *Projections based on FM 10 Actuals	GOV BUDGET				
	Actuals 2013-14	CY 2014-15	BY 2015-16	BY +1 2016-17	BY +2 2017-18
<b>BEGINNING BALANCE</b>	\$ 348	\$ 399	\$ 294	\$ 217	\$ 180
Prior Year Adjustment	\$ -4	\$ -	\$ -	\$ -	\$ -
Adjusted Beginning Balance	\$ 344	\$ 399	\$ 294	\$ 217	\$ 180
<b>REVENUES AND TRANSFERS</b>					
Revenues:					
125600 Other regulatory fees	\$ 2	\$ 3	\$ 5	\$ 5	\$ 5
125700 Other regulatory licenses and permits	\$ 105	\$ 91	\$ 115	\$ 115	\$ 115
125800 Renewal fees	\$ 368	\$ 404	\$ 420	\$ 420	\$ 420
125900 Delinquent fees	\$ 3	\$ 3	\$ 5	\$ 5	\$ 5
141200 Sales of documents	\$ -	\$ -	\$ -	\$ -	\$ -
142500 Miscellaneous services to the public	\$ -	\$ -	\$ -	\$ -	\$ -
150300 Income from surplus money investments	\$ 1	\$ 1	\$ 1	\$ 2	\$ 1
150500 Interest from Interfund loan	\$ -	\$ -	\$ -	\$ -	\$ -
160400 Sale of fixed assets	\$ -	\$ -	\$ -	\$ -	\$ -
161000 Escheat of unclaimed checks and warrants	\$ -	\$ -	\$ -	\$ -	\$ -
161400 Miscellaneous revenues	\$ -	\$ -	\$ -	\$ -	\$ -
Totals, Revenues	\$ 479	\$ 502	\$ 546	\$ 547	\$ 546
Transfers from Other Funds					
Transfers to Other Funds					
Totals, Revenues and Transfers	\$ 479	\$ 502	\$ 546	\$ 547	\$ 546
Totals, Resources	\$ 823	\$ 901	\$ 840	\$ 764	\$ 726
<b>EXPENDITURES</b>					
Disbursements:					
0840 State Controller (State Operations)	\$ -	\$ -	\$ -	\$ -	\$ -
1111 Program Expenditures (State Operations)	\$ 422	\$ 607	\$ 622	\$ 584	\$ 596
8880 Financial Information System for California (State Operations)	\$ 2	\$ -	\$ 1	\$ -	\$ -
Total Disbursements	\$ 424	\$ 607	\$ 623	\$ 584	\$ 596
<b>FUND BALANCE</b>					
Reserve for economic uncertainties	\$ 399	\$ 294	\$ 217	\$ 180	\$ 129
Months In Reserve	7.9	5.7	4.5	3.6	2.5

DEPARTMENT OF CONSUMER AFFAIRS  
**3108 - PROFESSIONAL FIDUCIARIES BUREAU**

**BUDGET REPORT**

**FY 2014-15 EXPENDITURE PROJECTION  
 CALSTARS REPORT AS OF 4/30/2015**

OBJECT DESCRIPTION	FY 2014-15		
	BUDGET ALLOTMENT	CURRENT YEAR EXPENDITURES	PROJECTIONS TO YEAR END
<b>PERSONNEL SERVICES</b>			
Salary & Wages	109,756	82,352	103,000
Statutory Exempt	57,212	48,629	60,000
Temp Help (Seasonal)	22,000	5,885	14,000
Committee Members		1,800	3,500
Staff Benefits	81,945	77,823	96,847
<b>TOTALS, PERSONNEL SVCS</b>	270,913	216,489	277,347
<b>OPERATING EXPENSE AND EQUIPMENT</b>			
<b>TOTALS, OE&amp;E</b>	339,724	316,344	329,842
<b>TOTAL EXPENSES</b>	610,637	532,833	607,189
<b>NET APPROPRIATION</b>	610,637	532,833	607,189
		<b>Surplus/(Deficit):</b>	<b>3,448</b>

NOTES/ASSUMPTIONS

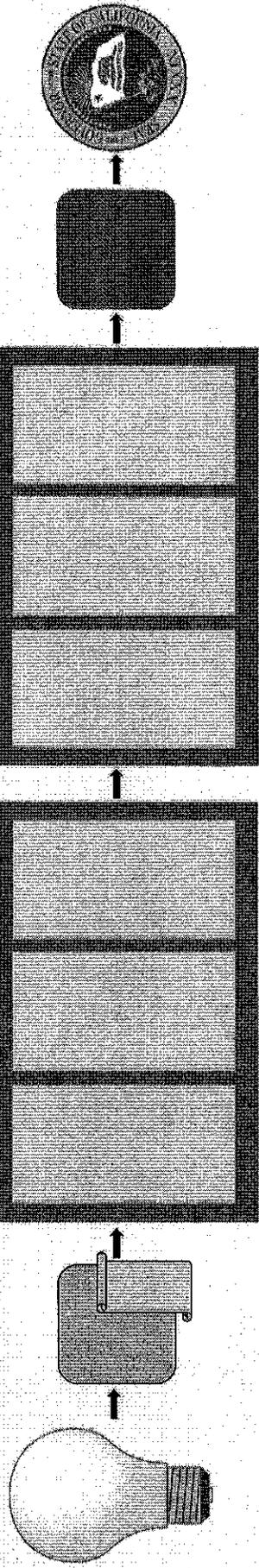
1. CY expenditures include YTD+ Encumbrances

# The Legislative Process: A Primer



ROAD  
MAP

# The Legislative Process: A Roadmap From Idea to Law



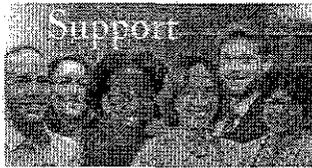
# Major Terms: Defined

- Assembly
- Senate
- House of Origin (First House)
- Second House
- Author
- Sponsor
- Enrolled
- Chaptered
- Chaptering-out
- Double-jointing
- Legislative Staffer
- Stakeholders

# Cast Of Characters



**Legislators**



**Legislative Staff**



**Governor's Administration**



**Constitutional Offices**



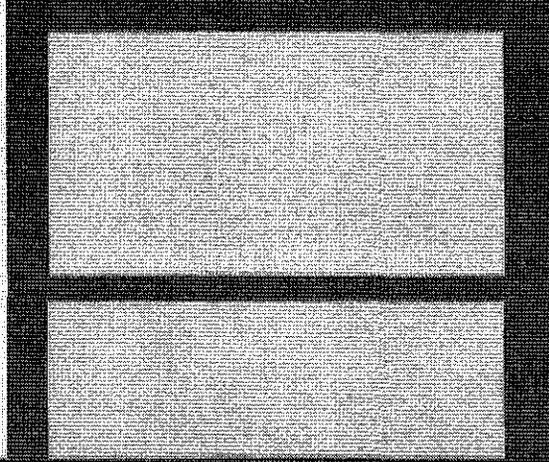
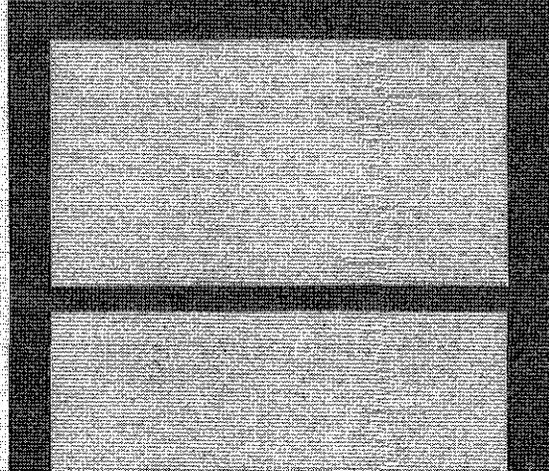
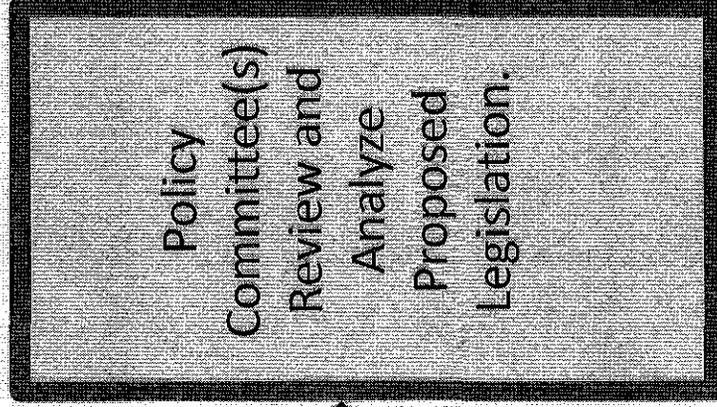
**Independent Boards**



**Stakeholders and Interest Groups**



# Policy Committee



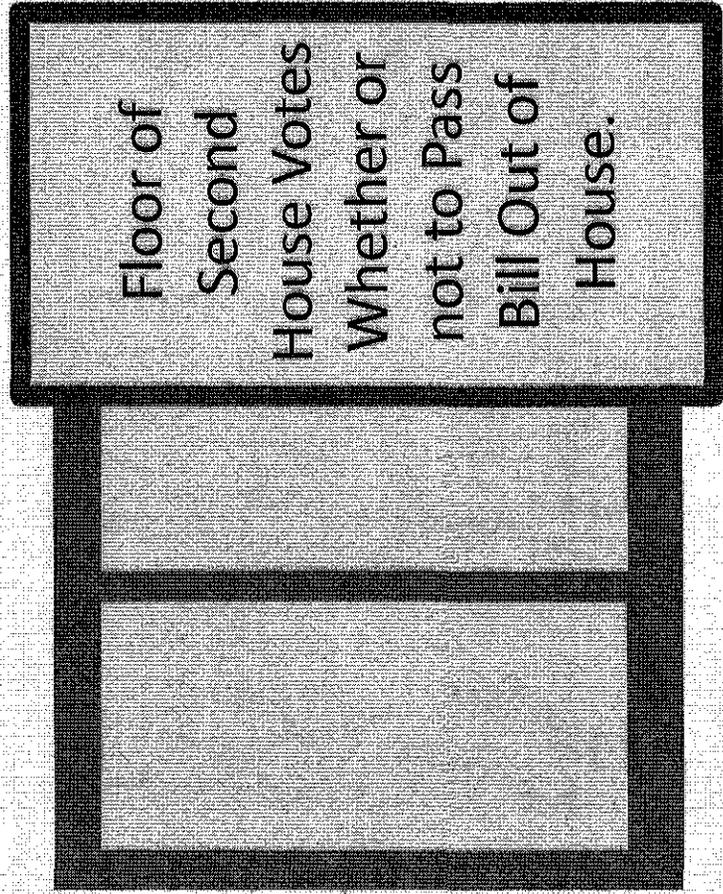
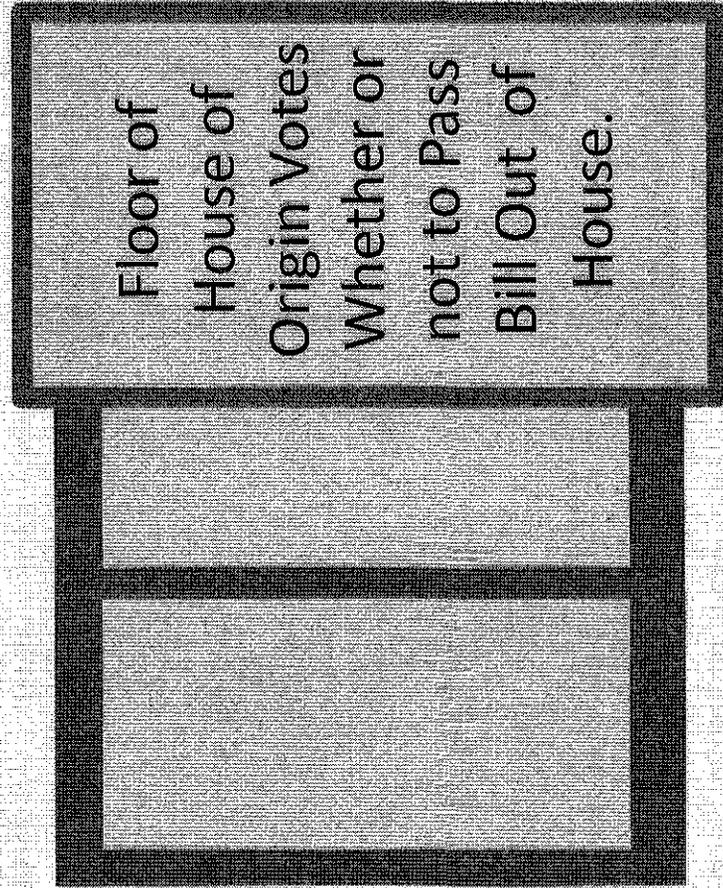
# Appropriations Committee

Fiscal  
Committee  
Reviews and  
Analyzes  
Proposed  
Legislation,  
if Necessary.

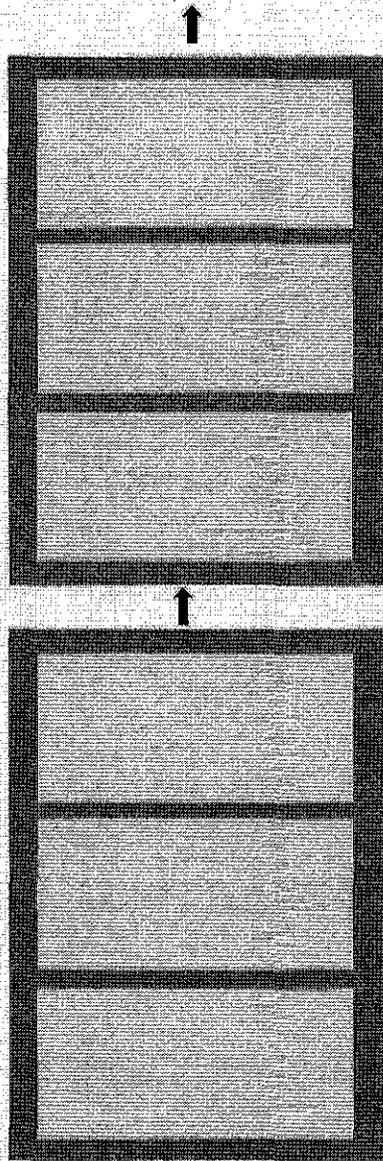


Fiscal  
Committee  
Reviews and  
Analyzes  
Proposed  
Legislation,  
if Necessary.

# Floor Consideration

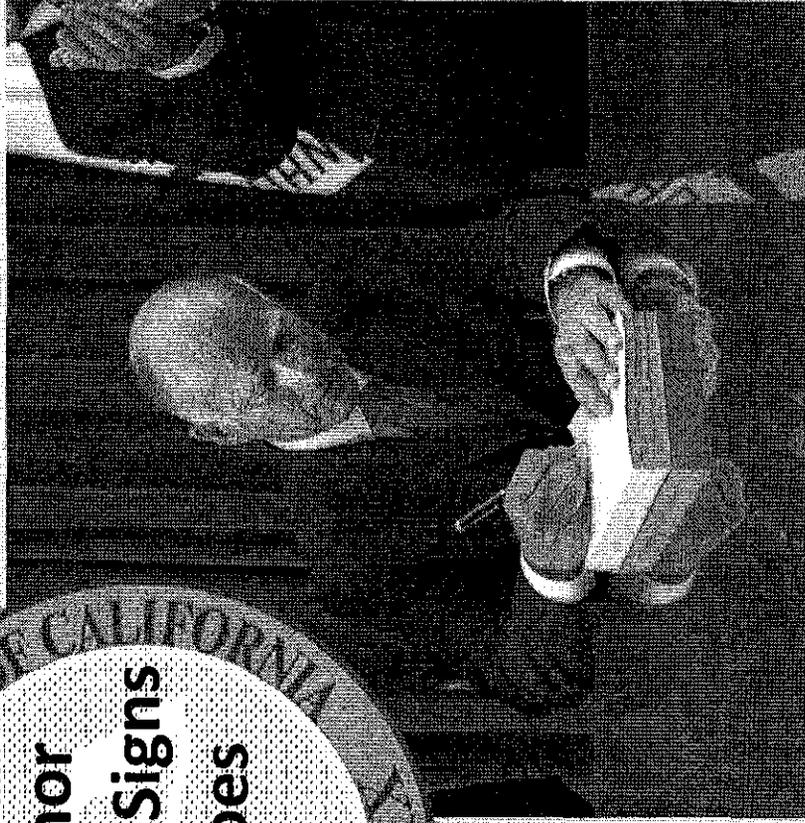
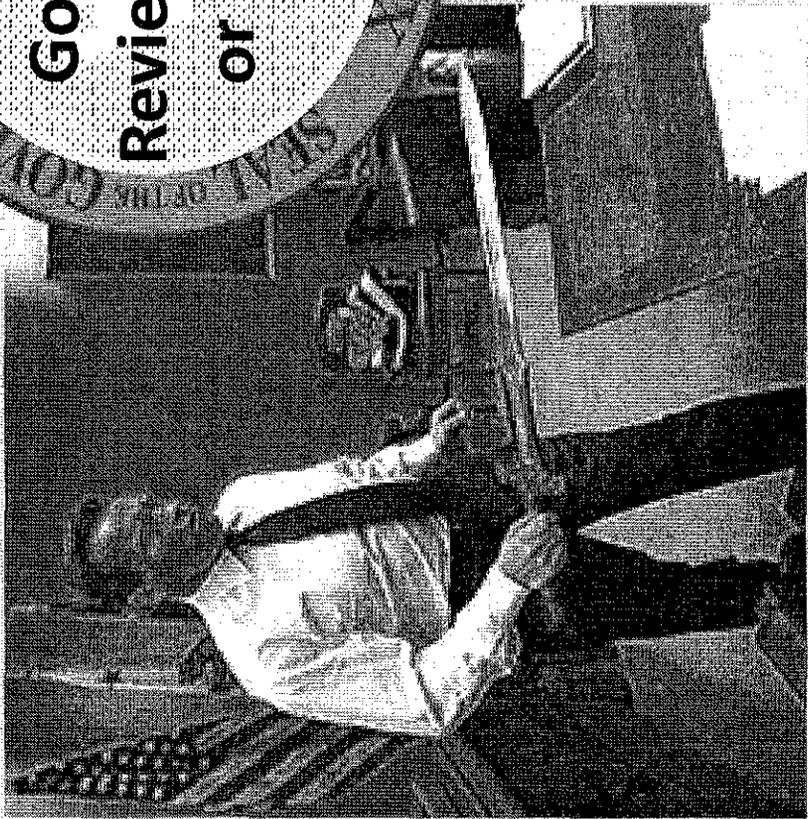
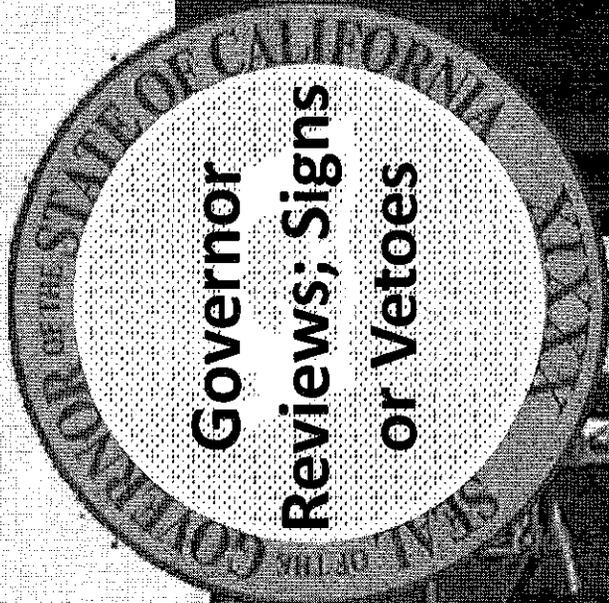


# Floor Consideration

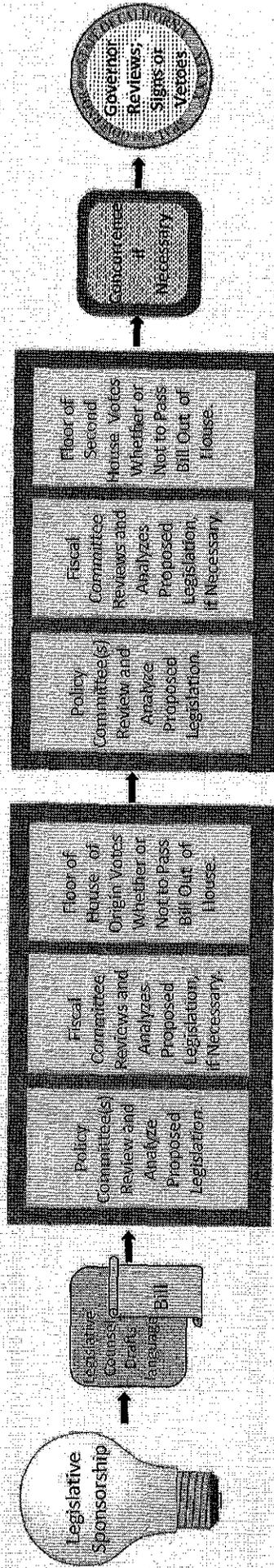


Concurrence  
if  
Necessary

# The Governor



# The Legislative Process: A Complete Picture



# Major Legislative Deadlines

## Most Important Dates:

- Last day to introduce bills
- First house deadline
- Last day to amend on the Floor
- Last day for bills to pass on the Floor
- Last day for Governor to sign or veto bills passed by the Legislature

## Definitions of Common Terms

### **Assembly**

The California State Assembly is the lower house of the California State Legislature. It consists of eighty members, with each member representing at least 465,000 people. The Assembly is associated with the color green.

### **Senate**

The California State Senate is the upper house of the California State Legislature. The legislative body consists of 40 members, with each member representing approximately 931,000 people. The Senate is associated with the color red.

### **House of Origin (First House)**

The House in which a measure begins; the Assembly is the House of Origin for all Assembly measures.

### **Second House**

The house which hears measures following the House of Origin.

### **Author**

The legislator that is listed as the principle author of the bill. There may be more than one, but generally, the most important author is the first listed.

### **Sponsor**

The private individual, or group who developed a piece of legislation and advocates its passage.

### **Chaptered**

After a bill has been signed by the Governor, the Secretary of State assigns the bill a Chapter Number, for example, "Chapter 123, Statutes of 1998," which subsequently may be used to refer to the measure.

### **Chaptering Out**

When, during a calendar year, two or more bills amending the same code section become law, the bill enacted last (with a higher chapter number) becomes law and prevails over ("chapters out") the code section in the bill or bills previously enacted. Chaptering out can be prevented with the adoption of "double jointing" amendments.

### **Double Jointing**

Double jointing refers to technical amendments necessary when two or more bills propose to amend the same code section (i.e., are in conflict). Double jointing prevents the problem of chaptering out.

**Enrolled**

Whenever a bill passes both Houses of the Legislature, it is ordered enrolled. Upon enrollment, the bill is again proofread for accuracy and then delivered to the Governor. The enrolled bill contains the complete text of the bill with the dates of passage certified by the Chief Clerk of the Assembly and the Secretary of the Senate.

**Legislative Staffer**

Staff of either a legislator or a legislative committee. This person is generally given a number of bills or certain subject areas to focus on for a session on behalf of their legislator or legislative committee.

**Stakeholders**

Groups or individuals that have an interest in a given subject matter. Stakeholders can include interest groups (associations), individuals, and government entities (state, local, federal).

**2015 TENTATIVE LEGISLATIVE CALENDAR**

COMPILED BY THE OFFICE OF THE SECRETARY OF THE SENATE  
Revised 01/26/2015

**DEADLINES**

JANUARY						
S	M	T	W	TH	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

- Jan. 1** Statutes take effect (Art. IV, Sec. 8(c)).
- Jan. 5** Legislature reconvenes (J.R. 51(a)(1)).
- Jan. 10** Budget must be submitted by Governor (Art. IV, Sec. 12 (a)).
- Jan. 19** Martin Luther King, Jr. Day.
- Jan. 30** Last day to submit bill requests to the Office of Legislative Counsel.

FEBRUARY						
S	M	T	W	TH	F	S
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15	16	17	18	19	20	21
22	23	24	25	26	27	28

- Feb. 16** Presidents' Day.
- Feb. 27** Last day for bills to be introduced (J.R. 61(a)(1), (J.R. 54(a)).

MARCH						
S	M	T	W	TH	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

- Mar. 26** Spring Recess begins at end of this day's session (J.R. 51(a)(2)).
- Mar. 31** Cesar Chavez Day.

APRIL						
S	M	T	W	TH	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

- Apr. 6** Legislature reconvenes from Spring Recess (J.R. 51(a)(2)).

MAY						
S	M	T	W	TH	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

- May 1** Last day for policy committees to hear and report to Fiscal Committees fiscal bills introduced in their house (J.R. 61(a)(2)).
- May 15** Last day for policy committees to hear and report to the Floor non-fiscal bills introduced in their house (J.R. 61(a)(3)).
- May 22** Last day for policy committees to meet prior to June 8 (J.R. 61(a)(4)).
- May 25** Memorial Day.
- May 29** Last day for fiscal committees to hear and report to the Floor bills introduced in their house (J.R. 61 (a)(5)). Last day for fiscal committees to meet prior to June 8 (J.R. 61 (a)(6)).

\*Holiday schedule subject to final approval by Rules committee

**2015 TENTATIVE LEGISLATIVE CALENDAR**

COMPILED BY THE OFFICE OF THE SECRETARY OF THE SENATE  
Revised 01/26/2015

JUNE						
S	M	T	W	TH	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

**June 1 – 5 Floor Session only.** No committee may meet for any purpose (J.R. 61(a)(7)).

**June 5** Last day for bills to be passed out of the house of origin (J.R. 61(a)(8)).

**June 8** Committee meetings may resume (J.R. 61(a)(9)).

**June 15** Budget must be passed by **midnight** (Art. IV, Sec. 12(c)(3)).

JULY						
S	M	T	W	TH	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

**July 3** Independence Day observed.

**July 17** Last day for **policy committees** to meet and report bills (J.R. 61(a)(10)). **Summer Recess** begins at the end of this day's session, provided Budget has been enacted (J.R. 51(a)(3)).

AUGUST						
S	M	T	W	TH	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

**Aug. 17** Legislature reconvenes from **Summer Recess** (J.R. 51(a)(3)).

**Aug. 28** Last day for **fiscal committees** to meet and report bills to the Floor (J.R. 61(a)(11)).

**Aug. 31 – Sept. 11 Floor Session only.** No committees, other than conference committees and Rules Committee, may meet for any purpose (J.R. 61(a)(12)).

SEPTEMBER						
S	M	T	W	TH	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

**Sept. 4** Last day to amend bills on the Floor (J.R. 61(a)(13)).

**Sept. 7** Labor Day.

**Sept. 11** Last day for each house to pass bills (J.R. 61(a)(14)). **Interim Study Recess** begins at end of this day's session (J.R. 51(a)(4)).

**IMPORTANT DATES OCCURRING DURING INTERIM STUDY RECESS**

**2015**

Oct. 11 Last day for Governor to sign or veto bills passed by the Legislature on or before Sept. 11 and in the Governor's possession after Sept. 11 (Art. IV, Sec.10(b)(1)).

**2016**

Jan. 1 Statutes take effect (Art. IV, Sec. 8(c)).

Jan. 4 Legislature reconvenes (J.R. 51 (a)(4)).

\*Holiday schedule subject to final approval by Rules committee

**2015 TENTATIVE LEGISLATIVE CALENDAR**

COMPILED BY THE OFFICE OF THE ASSEMBLY CHIEF CLERK

Revised 1-8-15

**DEADLINES**

JANUARY							
	S	M	T	W	TH	F	S
					1	2	3
Wk. 1	4	5	6	7	8	9	10
Wk. 2	11	12	13	14	15	16	17
Wk. 3	18	19	20	21	22	23	24
Wk. 4	25	26	27	28	29	30	31

FEBRUARY							
	S	M	T	W	TH	F	S
Wk. 1	1	2	3	4	5	6	7
Wk. 2	8	9	10	11	12	13	14
Wk. 3	15	16	17	18	19	20	21
Wk. 4	22	23	24	25	26	27	28

MARCH							
	S	M	T	W	TH	F	S
Wk. 1	1	2	3	4	5	6	7
Wk. 2	8	9	10	11	12	13	14
Wk. 3	15	16	17	18	19	20	21
Wk. 4	22	23	24	25	26	27	28
Spring Recess	29	30	31				

APRIL							
	S	M	T	W	TH	F	S
Spring Recess				1	2	3	4
Wk. 1	5	6	7	8	9	10	11
Wk. 2	12	13	14	15	16	17	18
Wk. 3	19	20	21	22	23	24	25
Wk. 4	26	27	28	29	30		

MAY							
	S	M	T	W	TH	F	S
Wk. 4						1	2
Wk. 1	3	4	5	6	7	8	9
Wk. 2	10	11	12	13	14	15	16
Wk. 3	17	18	19	20	21	22	23
Wk. 4	24	25	26	27	28	29	30
No Hrgs.	31						

- Jan. 1** Statutes take effect (Art. IV, Sec. 8(c)).
- Jan. 5** Legislature reconvenes (J.R. 51(a)(1)).
- Jan. 10** Budget Bill must be submitted by Governor (Art. IV, Sec. 12(a)).
- Jan. 19** Martin Luther King, Jr. Day observed.
- Jan. 30** Last day to submit bill requests to the Office of Legislative Counsel.

- Feb. 16** Presidents' Day observed.
- Feb. 27** Last day for bills to be introduced (J.R. 61(a)(1), J.R. 54(a)).

- Mar. 26** Spring Recess begins upon adjournment (J.R. 51(a)(2)).
- Mar. 31** Cesar Chavez Day observed.

- Apr. 6** Legislature reconvenes from Spring Recess (J.R. 51(a)(2)).

- May 1** Last day for policy committees to hear and report fiscal bills for referral to fiscal committees (J.R. 61(a)(2)).
- May 15** Last day for policy committees to hear and report to the Floor nonfiscal bills (J.R. 61(a)(3)).
- May 22** Last day for policy committees to meet prior to June 8 (J.R. 61(a)(4)).
- May 25** Memorial Day observed.
- May 29** Last day for fiscal committees to hear and report bills to the Floor (J.R. 61(a)(5)). Last day for fiscal committees to meet prior to June 8 (J.R. 61(a)(6)).

**2015 TENTATIVE LEGISLATIVE CALENDAR**

COMPILED BY THE OFFICE OF THE ASSEMBLY CHIEF CLERK

Revised 1-8-15

JUNE							
	S	M	T	W	TH	F	S
No Hrgs.		1	2	3	4	5	6
Wk. 1	7	8	9	10	11	12	13
Wk. 2	14	15	16	17	18	19	20
Wk. 3	21	22	23	24	25	26	27
Wk. 4	28	29	30				

**June 1-5 Floor Session only.** No committee may meet for any purpose except for Rules Committee and Conference Committees (J.R. 61(a)(7)).

**June 5** Last day to pass bills out of house of origin (J.R. 61(a)(8)).

**June 8** Committee meetings may resume (J.R. 61(a)(9)).

**June 15** Budget Bill must be passed by midnight (Art. IV, Sec. 12(c)(3)).

JULY							
	S	M	T	W	TH	F	S
Wk. 4				1	2	3	4
Wk. 1	5	6	7	8	9	10	11
Wk. 2	12	13	14	15	16	17	18
Summer Recess	19	20	21	22	23	24	25
Summer Recess	26	27	28	29	30	31	

**July 3** Independence Day observed.

**July 17** Last day for policy committees to meet and report bills (J.R. 61(a)(10)). **Summer Recess** begins upon adjournment, provided Budget Bill has been passed (J.R. 51(a)(3)).

AUGUST							
	S	M	T	W	TH	F	S
Summer Recess							1
Summer Recess	2	3	4	5	6	7	8
Summer Recess	9	10	11	12	13	14	15
Wk. 3	16	17	18	19	20	21	22
Wk. 4	23	24	25	26	27	28	29
No Hrgs.	30	31					

**Aug. 17** Legislature reconvenes from Summer Recess (J.R. 51(a)(3)).

**Aug. 28** Last day for fiscal committees to meet and report bills to the Floor (J.R. 61(a)(11)).

**Aug. 31 – Sept. 11 Floor Session only.** No committee may meet for any purpose except for Rules Committee and Conference Committees (J.R. 61(a)(12)).

SEPTEMBER							
	S	M	T	W	TH	F	S
No Hrgs.			1	2	3	4	5
No Hrgs.	6	7	8	9	10	11	12
Interim Recess	13	14	15	16	17	18	19
Interim Recess	20	21	22	23	24	25	26
Interim Recess	27	28	29	30			

**Sept. 4** Last day to amend on the Floor (J.R. 61(a)(13), A.R. 69(e)).

**Sept. 7** Labor Day observed.

**Sept. 11** Last day for any bill to be passed (J.R. 61(a)(14)). **Interim Study Recess** begins upon adjournment (J.R. 51(a)(4)).

**IMPORTANT DATES OCCURRING DURING INTERIM RECESS**

**2015**

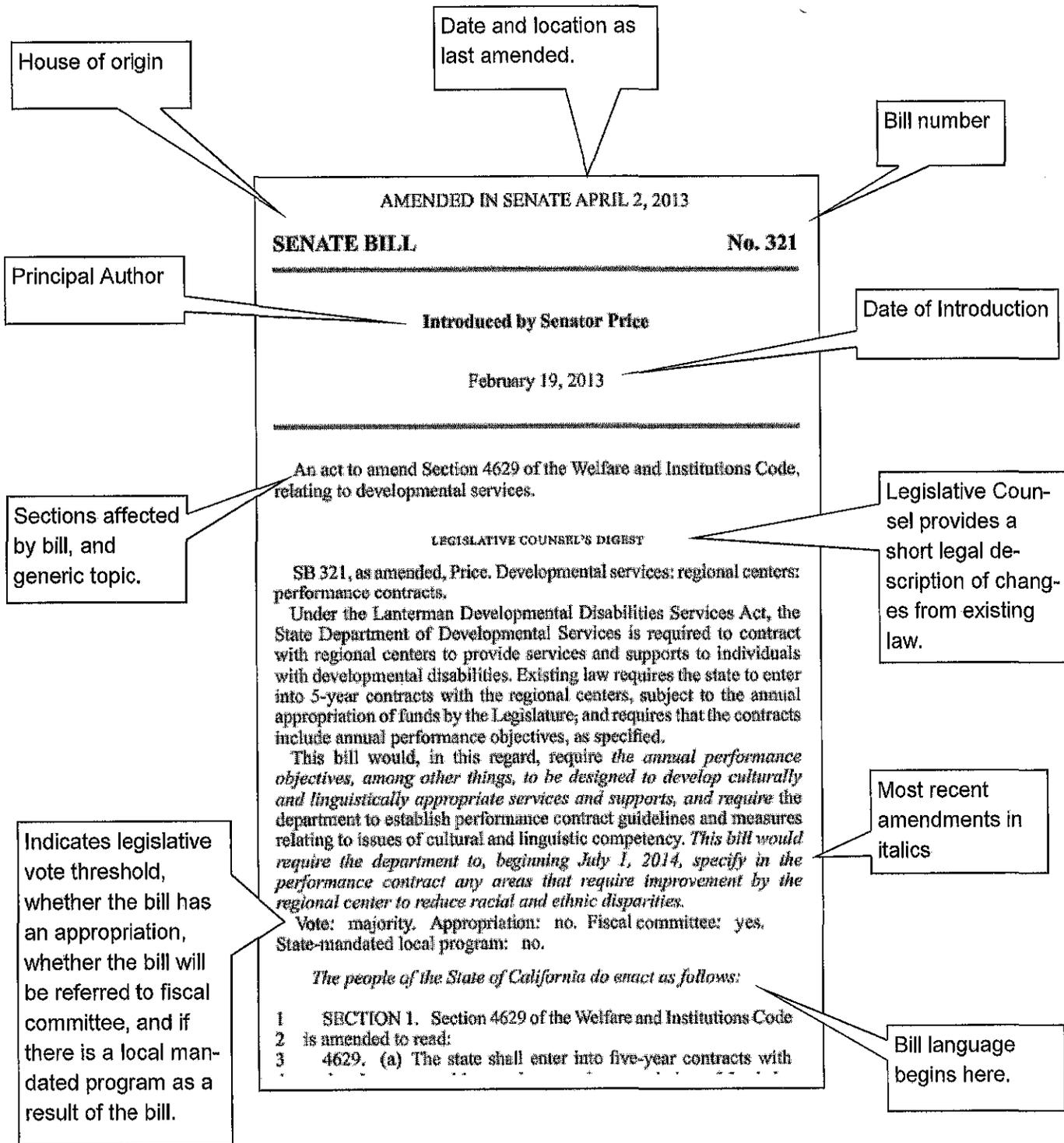
**Oct. 11** Last day for Governor to sign or veto bills passed by the Legislature on or before Sept. 11 and in the Governor's possession after Sept. 11 (Art. IV, Sec.10(b)(1)).

**2016**

**Jan. 1** Statutes take effect (Art. IV, Sec. 8(c)).

**Jan. 4** Legislature reconvenes (J.R. 51(a)(4)).

# Anatomy of a Bill



## **Professional Fiduciaries Bureau – Legislative Update**

### **Legislation Related to the Bureau**

#### **AB 436 (Jones) Guardian or conservator: powers and duties**

This bill clarifies that attorneys appointed by the court to represent conservatees in dementia powers cases are to be discharged by the court or ordered to continue representation upon the granting or denial of those powers.

#### **SB 155 (Hertzberg) Decedent's estates**

This bill authorizes the trustee of a decedent's previously established trust, to petition the superior court for an order to transfer real and personal property, of any amount or value, from the decedent's "pour-over will" to the trust.

#### **SB 269 (Vidak) Conservator appointments: compensation**

This bill allows interested parties who are successful in their petition for appointment of another, more appropriate person as conservator, to recover compensation, reimbursement of attorneys' fees and other costs incurred in connection with that petition.

#### **SB 589 (Block) Voting: voter registration: individuals with disabilities and conservatees**

This bill prohibits disqualifying a conservatee from voting if he or she would need to complete an affidavit for voter registration with reasonable accommodations. This bill also provides that a person is presumed competent to vote regardless of conservatorship status and clarifies the judicial procedures through which an individual with a disability or under a conservatorship would lose his or her ability to vote. In order to deem a person mentally incompetent and disqualified from voting, this bill would require a court to make a finding of clear and convincing evidence that the person cannot communicate, with or without reasonable accommodations, a desire to participate in the voting process.

### **Legislation Affecting all Departmental Programs**

#### **AB 12 (Cooley) State government: administrative regulations: review**

This bill would require every state agency, department, board, bureau or other entity to review and revise regulations to eliminate inconsistent, overlapping, duplicative, and outdated provisions and adopt the revisions as emergency regulations by January 1, 2018. Additionally, this bill would require the Business, Consumer Services, and Housing Agency to submit a report to the Governor and Legislature affirming compliance with these provisions. These provisions would be repealed by January 1, 2019.

#### **AB 750 (Low) Business and professions: licenses**

This bill would allow all programs within the Department to issue a retired license.

**AB 1060 (Bonilla) Professions and vocations: licensure**

This bill would authorize a board, upon suspension or revocation of a license, to provide the ex-licensee with certain information pertaining to rehabilitation, reinstatement, or penalty reduction through first-class mail or by electronic means.

**SB 467 (Hill) Professions and vocations**

This bill would require the Legislature to approve pro rata distributions at the Department. This bill would also require the Attorney General to implement performance measures regarding case referrals. In addition, this bill would direct the Division of Investigation (Division) to work cooperatively with healing arts boards regarding standard case referral to the Division. Finally, this bill would extend the sunset for the Board of Accountancy.



# Fiscal Year to Date Statistics through April 30, 2015

## LICENSING

Licenses Issued	56
Active Licenses	655
Total Licenses Issued	835

## ENFORCEMENT

Complaints Received	120
Complaints Closed	72
Complaints Pending	86
Average Days to Close Complaints	75
Accusations	3
Citations	3