



Professional Fiduciaries Bureau
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PRE-LICENSING EDUCATION INFORMATION

Legislation creating the Professional Fiduciaries Bureau was passed in 2006 to license and regulate non-family member private fiduciaries including certain conservators, guardians, trustees, and agents under durable power of attorney for health care and finances as defined in the Professional Fiduciaries Act (Act).

The Act requires any person in California representing himself or herself as a professional fiduciary be licensed by January 1, 2009. However, any professional fiduciary seeking a new court appointment between July 1, 2008 and December 31, 2008 must first obtain a license.

One major component of licensing is the requirement to obtain 30 hours of pre-licensing education credit in approved education courses. An approved education course must be relevant to fiduciary responsibilities of the person or of estate management for conservators, guardians, trustees, or agents under durable power of attorney, or of the court system or ethics for fiduciaries. Bureau approved courses must be taken from an accredited educational institution, or be approved or offered by an approved education provider.

APPROVED EDUCATION PROVIDERS

A local court of the State of California	Professional Fiduciary Association of California
California State Bar or American Bar Association	California State Association of Public Administrators, Public Guardians, and Public Conservators
California State Board of Accountancy	National Guardianship Association and its state affiliates
California State Board of Behavioral Sciences	National Association of Professional Geriatric Care Managers
Certified Financial Planner Board of Standards, Inc.	American Society of Aging
California Department of Insurance	Gerontological Society of America
California Board of Registered Nursing	National Association of Social Workers
California State Board of Psychology	National College of Probate Judges
California Department of Mental Health	National Elder Law Foundation
California Department of Social Services	American Bankers Association
California Department of Developmental Disabilities	Cannon Financial Institution

To earn pre-licensing education credit immediately, the Bureau has identified the following possible opportunities:

1. The CSUF Fullerton's Fiduciary Management Program online courses-website: www.csufextension.org
2. The National Guardianship Association online CE courses-website: www.guardianship.org/
3. The Professional Fiduciary Association of California's Annual Education Conference, May 2008-website: www.pfac-pro.org/pages/meetings.htm
4. The UC Riverside Extension Professional Fiduciary Certificate Program: <http://www.extension.ucr.edu/welcome/profid.html?iw=M0B88287A7020x6702c03L.ssc>
5. http://www.alz.org/norcal/in_my_community_professionals.asp
6. <http://www.guardianshipcert.org/>

For more information please visit the Bureau's website at www.fiduciary.ca.gov or contact the Bureau staff by email at fiduciary@dca.ca.gov.