

OUR MISSION

To protect consumers through licensing, education, and enforcement of the Professional Fiduciaries Act by promoting and upholding competency and ethical standards across the profession.



**Professional Fiduciaries Bureau (Bureau)
Advisory Committee Meeting
Wednesday, December 9, 2021**

Meeting Minutes

Committee Members Present

Chi Elder, Chair
Bertha Sanchez Hayden, Vice Chair
Wendy Hatch
Elizabeth Ichikawa
James Moore
Denise Nelesen

Department of Consumer Affairs (DCA) Staff Present

Rebecca May, Bureau Chief
Angela Cuadra, Bureau Program Analyst
Fred Chan-You, DCA Legal Counsel

- 1) Call to Order – Ms. Elder called the meeting to order at 10:00 a.m. and stated the meeting was being held via WebEx with no physical public locations due to Government Code section 11133.
- 2) Roll Call & Establishment of Quorum – Ms. Cuadra called roll. Committee members Ms. Wendy Hatch, Ms. Chi Elder, Ms. Bertha Sanchez Hayden, Ms. Denise Nelesen, Ms. Elizabeth Ichikawa, and Mr. James Moore were present via WebEx. A quorum was established with six members present.
- 3) Advisory Committee, Bureau Chief, Staff and Legal Counsel Introductions – Committee members, bureau staff, and legal counsel introduced themselves.
- 4) Public Comment on Items Not on the Agenda –

Public Comment: None.
- 5) Reading of the Professional Fiduciaries Bureau Mission Statement – Ms. May read the bureau’s mission statement.

Public Comment: None.
- 6) Discussion and Possible Approval of the Advisory Committee Meeting Minutes from September 15, 2021 –

Ms. Hatch requested the last bullet on agenda item number ten be amended to read “and stated that he believes the bureau has determined it is not a violation when a licensee bills for more than 24 hours in a day.” Ms. Hatch motioned to approve the minutes with the proposed amendment. Ms. Nelesen seconded the motion. A vote by roll call was made: Ms. Hatch, Mr. Moore, Ms. Elder, Ms. Sanchez Hayden, Ms. Nelesen, and Ms. Ichikawa were in favor. There was no discussion from the committee members and the motion carried with six votes. Ms. Cuadra stated the minutes would be posted to the website as amended.

Public Comment: None.

7) Update from the Director’s Office –

Ms. Brianna Miller, Board and Bureau Relations, reported regarding the Department’s Covid19 safety measures and telework policy. Ms. Miller explained the vaccination and test procedures employees of the Department are required to follow. She reported that remote meetings would be allowed until January 31, 2022, and unless there are future updates, all meetings will be required to meet in person after that date. She also reported that the bureau has one vacant position for a licensee member and the Department is working on recruitment for that position. Finally, 2021 is a mandatory Sexual Harassment Prevention training year and all staff and committee members are required to complete training this year.

Public Comment: None.

8) Budget Report –

Ms. Harmony DeFilippo, Budget Analyst, presented the budget projection report and fund condition for the bureau.

Public Comment: None.

9) Legislative Update and Discussion –

Mr. Greg Pruden, DCA Legislative Manager, reviewed the legislative calendar and status of bills listed on the agenda.

Ms. Hatch stated she thought AB 1194 was removed and Mr. Pruden stated the bill was signed into law. Ms. May stated that Ms. Hatch may be referring to the Client Notification regulation which was withdrawn, not AB 1194. Ms. Nelesen asked if the fine in AB 1194 is for non-professionals as well as professionals. Mr. Pruden stated that section 17 of the bill the fine for non-professionals is a different amount as a professional. Ms. Nelesen stated this may cause individuals not to be licensed. Ms. Nelesen also asked if the schedule of fees would apply to hourly rate only. Mr. Pruden answered the statute reads including but not limited to hourly fees. Ms. May stated that at a minimum the hourly fees will be

posted. Mr. Pruden stated the goal of this law is transparency. Ms. Sanchez Hayden asked how they will differentiate between the GC355 and the care plan for SB 602. Mr. Pruden and Ms. May indicated that they not familiar with the GC355 but will report back at the next meeting. Ms. Sanchez-Hayden clarified that the GC355 is a Judicial Council form.

Public Comment: None.

10) Bureau Updates – Ms. May presented the bureau’s statistics as of October 31, 2021.

- Application Licensing and Enforcement Statistics –

July 1, 2021 – October 31, 2021	
New Licenses	25
Active Licenses	842
Total Licenses Issued	1,280
New Applications Received	36
AG Cases Initiated	0
Citations Issued	0
Complaints Received	34
Complaints Closed	41
Complaints Pending	103
Average Days to Close Complaints	506

Ms. May acknowledged that 506 days to close a complaint is a very high average, but it is down from the last meeting. There are no hard deadlines to close complaints, and some are more complex and take longer to investigate.

- Outreach Events – There have been no outreach events since the last meeting. Ms. May asked the committee to inform the bureau of any outreach events by email.
- E-Newsletter – Ms. May stated the fall newsletter is almost complete and will be disseminated to the interested parties list by the end of the year.
- Delays in Mail Delivery and Receipt – Ms. May stated the delays seem to have improved since the post office box was closed in July. Ms. May requested all mail be mailed to the bureau’s physical address and if confirmation of receipt is needed, to please send via a delivery method that allows for tracking. Additionally, to further shorten processing times, initial annual and annual statements may be sent to the bureau by email to PFBRenewals@dca.ca.gov or by fax to (916) 574-8645. All emailed statements will receive a confirmation email of receipt.

- Strategic Plan – Enforcement Objective – Ms. May asked the advisory committee members to examine objective 3.5 under the communication and outreach section of the strategic plan and bring back ideas to discuss at the next advisory meeting.

Public Comment: None.

11) Strategic Plan Discussion of Recommendations from the Committee for Goal 2:

Enforcement – Ms. May began the discussion on the following items:

- Item 2.4 – Determine the feasibility of utilizing an internal consultant to assist with review of enforcement cases.

Ms. Hatch asked if a licensee would have to give up their practice to participate and Ms. May replied no. Ms. Hatch also asked what type of liability would be involved and would it be confidential or public. Ms. May stated it would be a high-level discussion and personal information would be confidential. Ms. Nelesen suggested a retired fiduciary may be a good option. Ms. Hatch stated a retired fiduciary would not have liability insurance. Mr. Chan-You asked for clarification on liability. Ms. Hatch stated that the internal consultant may be open to liability or civil suit from the party that is being investigated. Ms. Ichikawa asked if the consultant would be paid and Ms. May replied that there would be a contract and the consultant would be paid for a limited number of hours. Ms. Ichikawa also asked if using a public guardian may work for this position. Mr. Moore suggested contacting the Professional Fiduciaries Association of California for recommendations. Ms. Elder asked if there is a criterion in place and Ms. May replied the criteria is not in place but would be similar to the criteria used to hire subject matter experts. Ms. Hatch asked to add the criteria to the next agenda for the committee members to assist with criteria selection.

Public Comment: None.

12) Proposed Rulemakings Update –

Ms. May reported that the inactive/retired license regulation was filed with the Office of Administrative Law on November 2, 2021 and the public comment period will end on December 27, 2021. The client notification proposed regulation was withdrawn from the Office of Administrative Law on November 16, 2021. The bureau is currently working with the Department to determine its next steps.

Public Comment: A comment was made on behalf of the Professional Fiduciaries Association of California, that the association appreciates the challenges with this regulation package and the consideration the bureau took of all the comments.

13) 2022 Chair and Vice Chair Advisory Committee Elections – Rebecca May, Bureau Chief

Ms. Hatch nominated the current Chair, Ms. Chi Elder, as the Chair for 2022. Ms. Sanchez Hayden seconded the motion. There were no other nominations There was no

other comment from the members or the public. A vote by roll call was made: Ms. Hatch, Mr. Moore, Ms. Elder, Ms. Sanchez Hayden, Ms. Nelesen, and Ms. Ichikawa were in favor. There was no discussion from the committee members and the motion carried with six votes.

Ms. Nelesen nominated Ms. Hatch for Vice Chair. Ms. Hatch declined the nomination.

Ms. Hatch nominated Ms. Sanchez Hayden for Vice Chair for 2022. Ms. Elder seconded the motion. There were no other nominations There was no other comment from the members or the public. A vote by roll call was made: Ms. Hatch, Mr. Moore, Ms. Elder, Ms. Sanchez Hayden, Ms. Nelesen, and Ms. Ichikawa were in favor. There was no discussion from the committee members and the motion carried with six votes.

Public Comment: None.

14) Future Agenda Items –

Ms. Cuadra noted the agenda items requested to be added to a future agenda were:
-Clarification of the difference between the care plan and a GC355 in SB 602.
-Developing criteria for an Internal Consultant.

Public Comment: None.

15) Future Meeting Dates

- Wednesday, March 9, 2022
- Wednesday, June 22, 2022
- Wednesday, September 14, 2022
- Wednesday, December 7, 2022

Committee members did not mention any scheduling conflicts for the future dates and were asked to contact Ms. Cuadra if any conflicts arise.

Public Comment: None.

16) Adjournment – The meeting was adjourned at 11:21 a.m.

Department of Consumer Affairs

Expenditure Projection Report

Professional Fiduciaries Bureau

Reporting Structure(s): 11117000 Support

Fiscal Month: 6

Fiscal Year: 2021 - 2022

Run Date: 01/31/2022

PERSONAL SERVICES

Fiscal Code	Line Item	PY Budget	PY YTD	PY Encumbrance	PY YTD + Encumbrance	PY FM13	Budget	Current Month	YTD	Encumbrance	YTD + Encumbrance	Projections to Year End	Balance
5100	PERMANENT POSITIONS	\$187,000	\$114,808	\$0	\$114,808	\$232,518	\$223,000	\$17,513	\$124,571	\$0	\$124,571	\$261,813	-\$38,813
5100	TEMPORARY POSITIONS	\$22,000	\$0	\$0	\$0	\$0	\$22,000	\$1,567	\$2,001	\$0	\$2,001	\$8,004	\$13,996
5105-5108	PER DIEM, OVERTIME, & LUMP SUM	\$0	\$200	\$0	\$200	\$600	\$0	\$0	\$0	\$0	\$0	\$600	-\$600
5150	STAFF BENEFITS	\$124,000	\$59,106	\$0	\$59,106	\$116,542	\$137,000	\$9,901	\$63,170	\$0	\$63,170	\$134,660	\$2,340
PERSONAL SERVICES		\$333,000	\$174,115	\$0	\$174,115	\$349,660	\$382,000	\$28,981	\$189,742	\$0	\$189,742	\$405,076	-\$23,076

OPERATING EXPENSES & EQUIPMENT

Fiscal Code	Line Item	PY Budget	PY YTD	PY Encumbrance	PY YTD + Encumbrance	PY FM13	Budget	Current Month	YTD	Encumbrance	YTD + Encumbrance	Projections to Year End	Balance
5301	GENERAL EXPENSE	\$5,000	\$53	\$0	\$53	\$248	\$2,000	\$122	\$122	\$0	\$122	\$422	\$1,578
5302	PRINTING	\$1,000	\$353	\$1,408	\$1,761	\$2,011	\$1,000	\$0	\$750	\$452	\$1,202	\$1,822	-\$822
5304	COMMUNICATIONS	\$1,000	\$170	\$0	\$170	\$335	\$1,000	\$3	\$47	\$0	\$47	\$336	\$664
5306	POSTAGE	\$2,000	\$0	\$0	\$0	\$176	\$2,000	\$71	\$71	\$0	\$71	\$200	\$1,800
5308	INSURANCE	\$0	\$0	\$0	\$0	\$41	\$0	\$0	\$0	\$0	\$0	\$41	-\$41
53202-204	IN STATE TRAVEL	\$4,000	\$0	\$0	\$0	\$0	\$4,000	\$0	\$0	\$0	\$0	\$0	\$4,000
5322	TRAINING	\$1,000	\$0	\$0	\$0	\$0	\$1,000	\$0	\$0	\$0	\$0	\$0	\$1,000
5324	FACILITIES	\$40,000	\$20,396	\$0	\$20,396	\$41,984	\$40,000	\$3,493	\$21,097	\$20,582	\$41,679	\$41,679	-\$1,679
53402-53403	C/P SERVICES (INTERNAL)	\$78,000	\$22,395	\$0	\$22,395	\$49,773	\$78,000	\$220	\$4,153	\$0	\$4,153	\$34,153	\$43,847
53404-53405	C/P SERVICES (EXTERNAL)	\$0	\$0	\$328	\$328	\$434	\$10,000	\$0	\$204	\$7,058	\$7,262	\$7,262	\$2,738
5342	DEPARTMENT PRORATA	\$107,000	\$84,750	\$0	\$84,750	\$103,500	\$125,000	\$30,250	\$90,750	\$0	\$90,750	\$125,000	\$0
5342	DEPARTMENTAL SERVICES	\$4,000	\$17	\$0	\$17	\$17	\$4,000	\$0	\$77	\$0	\$77	\$77	\$3,923
5344	CONSOLIDATED DATA CENTERS	\$0	\$0	\$0	\$0	\$1,405	\$0	\$0	\$0	\$0	\$0	\$1,405	-\$1,405
5346	INFORMATION TECHNOLOGY	\$1,000	\$0	\$8	\$8	\$211	\$1,000	\$0	\$0	\$531	\$531	\$531	\$469
5362-5368	EQUIPMENT	\$0	\$40	\$21	\$61	\$81	\$0	\$86	\$86	\$0	\$86	\$107	-\$107
54	SPECIAL ITEMS OF EXPENSE	\$0	\$0	\$0	\$0	\$194	\$0	\$0	\$0	\$0	\$0	\$0	\$194
OPERATING EXPENSES & EQUIPMENT		\$244,000	\$128,173	\$1,766	\$129,939	\$200,411	\$269,000	\$34,244	\$117,357	\$28,623	\$145,980	\$213,036	\$55,964

OVERALL TOTALS		\$577,000	\$302,287	\$1,766	\$304,053	\$550,071	\$651,000	\$63,225	\$307,099	\$28,623	\$335,722	\$618,112	\$32,888
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5.05%

3108 - Professional Fiduciary Fund

Analysis of Fund Condition

Prepared 2.01.2022

(Dollars in Thousands)

2022-23 Governor's Budget
 CY 2021-22 Expenditure and Revenue Projections Based on FM 6

	Actual 2020-21	CY 2021-22	Governor's Budget BY 2022-23	BY + 1 2023-24
BEGINNING BALANCE	\$ 265	\$ 343	\$ 337	\$ 43
Prior Year Adjustment	\$ -7	\$ -	\$ -	\$ -
Adjusted Beginning Balance	\$ 258	\$ 343	\$ 337	\$ 43
REVENUES AND TRANSFERS				
Revenues:				
4121200 Delinquent fees	\$ 3	\$ 4	\$ 4	\$ 4
4127400 Renewal fees	\$ 523	\$ 526	\$ 576	\$ 576
4129200 Other regulatory fees	\$ 29	\$ 18	\$ 57	\$ 57
4129400 Other regulatory licenses and permits	\$ 122	\$ 114	\$ 163	\$ 163
4163000 Income from surplus money investments	\$ 2	\$ 1	\$ 8	\$ 8
Totals, Revenues	\$ 679	\$ 663	\$ 808	\$ 808
Totals, Revenues and Transfers	\$ 679	\$ 663	\$ 808	\$ 808
Totals, Resources	\$ 937	\$ 1,006	\$ 1,145	\$ 851
EXPENDITURES				
Disbursements:				
1111 Department of Consumer Affairs Program Expenditures (State Operations)	\$ 550	\$ 618	\$ 1,050	\$ 1,082
9892 Supplemental Pension Payments (State Operations)	\$ 12	\$ 12	\$ 12	\$ 12
9900 Statewide General Administrative Expenditures (Pro Rata) (State Operations)	\$ 32	\$ 39	\$ 40	\$ 40
Total Disbursements	\$ 594	\$ 669	\$ 1,102	\$ 1,134
FUND BALANCE				
Reserve for economic uncertainties	\$ 343	\$ 337	\$ 43	\$ (283)
Months in Reserve	6.2	3.7	0.5	-3.0

NOTES:

- A. ASSUMES WORKLOAD AND REVENUE PROJECTIONS ARE REALIZED FOR BY + 1 AND ON-GOING
- B. ASSUMES APPROPRIATION GROWTH OF 3% PER YEAR IN BY + 1 AND ON-GOING
- C. CY REVENUE AND EXPENDITURES ARE PROJECTIONS BASED ON FM 6

**Professional Fiduciaries Bureau
March 9, 2022 Legislative Update**

Important Dates

- **January 1, 2022** – Statutes take effect.
- **January 3, 2022** – Legislature reconvenes.
- **February 18, 2022** – Last day for bills to be introduced.
- **May 27, 2022** – Last day for bills to be passed out of the house of origin.

2021 Legislation Related to the Bureau

AB 1062 (Mathis) Conservators and guardians: disposition of property

This bill would authorize a guardian or conservator of the estate to dispose of or abandon valueless property only after providing 15 days written notice and reasonable access to all persons who received notice of the guardianship or conservatorship petition. This bill would also authorize a person who received this notice to petition the court to resolve a property right dispute.

February 2022 Status: Two-year bill

AB 1662 (Gipson) Licensing boards: disqualification from licensure: criminal conviction

This bill would authorize a prospective applicant that has been convicted of a crime to submit to a board a request for a preapplication determination that includes information provided by the prospective applicant regarding their criminal conviction. The bill would require a board that receives that request to determine if the prospective applicant would be disqualified from licensure by the board based on the information submitted with the request and deliver that determination to the prospective applicant.

Status: Referred to Committee on Business and Professions on January 27, 2022.

AB 1663 (Maienschein) Protective proceedings

This bill would revise various procedures in the conservatorship process. Among other provisions, the bill would provide that, when equally qualified as other potential conservators, the Director of Developmental Services would be appointed subject to the existing order of preference. The bill would prohibit a regional center from acting as a guardian or conservator if the regional center also provides service coordination activities pursuant to specified existing law. The bill would only permit the appointment of the director or regional center as conservator if the proposed conservatee has not chosen another qualified person, as specified. The bill would require a petition for a general conservatorship of a person with a developmental disability to indicate why a limited conservatorship does not meet the needs of the proposed conservatee. The bill would require the court to provide conservatees with written information regarding their rights and options, including a personalized list of the rights the conservatee retains. The bill would expand the annual duties and reporting requirements of court investigators conducting required visits to assess the progress of the conservatorship. The bill would revise the procedures for termination of a limited conservatorships by requiring the court to terminate an uncontested petition for termination under specified circumstances, and without a hearing.

The bill would require the Judicial Council to establish a conservatorship diversion program in each superior court. Among other goals, the diversion program would seek less restrictive alternatives and protect the rights of individuals in conservatorships. The bill would designate the duties of court staff reviewing conservatorship cases under the diversion program.

The bill would establish a supported decisionmaking process for adults with disabilities. The bill would define “supported decisionmaking” as an individualized arrangement in which an adult with a disability chooses one or more trusted supporters to help them understand, make, communicate, implement, or act on, their own choices. The bill would authorize an adult with a disability to request and have present one or more adults, including supporters, in any meeting or communication. The bill would set forth the duties of supporters. The supportive decisionmaking agreement would be informal or memorialized in writing, and the bill would specify the elements of a written agreement. The bill would provide that a supported decisionmaking agreement may be terminated by the adult with a disability, by all supporters, or by the terms of the agreement. The agreement would also be terminated with respect to any supporter who is found liable for specified offenses with respect to the adult with a disability.

Status: Referred to Committee on Judiciary on January 27, 2022.

AB 1733 (Quirk) State bodies: open meetings

This bill would specify that a “meeting” under the act, includes a meeting held entirely by teleconference. The bill would require all open meetings to be held by teleconference, would allow for use of teleconference in closed sessions, and would remove existing provisions of the act that require each teleconference location to be identified in the notice and agenda and accessible to the public. The bill would instead require the state body to provide a means by which the public may remotely hear, or hear and observe, the meeting and may remotely address the state body via two-way audio-visual platform or two-way telephonic service, as specified, and would require information to be provided in any notice to the public indicating how the public can access the meeting remotely. The bill would require the state body to provide an opportunity for members of the public to address the state body. The bill would require the state body to provide members of the public a physical location to hear, observe, and address the state body, and would authorize the members of the state body to participate in a meeting remotely or at a designated physical meeting location, and specify that physical presence at any physical meeting location is not necessary for the member to be deemed present at the meeting. The bill would require the agenda to be posted 10 days in advance of the meeting, or as provided in accordance with the provisions applicable to a special or emergency meeting, as well as posted on the state body’s internet website and, on the day of the meeting, at any physical meeting location designated in the notice. The bill would also provide that the notice of the meeting is required to specify the means by which a meeting may be accessed by teleconference. The bill would prohibit the notice and agenda from disclosing any information regarding any remote location from which a member is participating, and require members attending a meeting from a remote location to disclose whether any other individuals 18 years of age or older are present in

the room, as specified. This bill would also exempt a board from the requirement to meet in northern and southern California each once a year if the board's meetings are held entirely by teleconference.

Status: Pending referral to a policy committee. May be heard on or after March 3, 2022.

SB 602 (Laird) Review of conservatorships: care plans

This bill would require a conservator, within 30 days of appointment and 30 days before a hearing, to submit a care plan to specified persons regarding the care, custody, and control of the conservatee. This bill would require the Judicial Council to develop for the care plan. This bill would impose sanctions for failure to timely submit a care plan; this includes a court imposed civil penalty of up to \$5,000 unless the court determines there is good cause to not impose a penalty.

February 2022 Status: Two-year bill



LICENSING AND ENFORCEMENT STATISTICS

JULY 1, 2021–JANUARY 31, 2022

LICENSING STATISTICS FISCAL YEAR 2021–22
TOTAL LICENSES ISSUED SINCE JULY 1, 2008
1,295
NUMBER OF ACTIVE LICENSES AS OF JANUARY 31, 2022
837
APPLICATIONS
Initial Applications Received FY 21-22: 57
Initial Licenses Issued FY 21-22: 40
PROCESSING TIME FOR COMPLETE APPLICATIONS
Quarter 1 (July–Sep): 25 days from receipt to approval to sit for exam 22 days from passing exam to issuance of license Quarter 2 (Oct–Dec): 23 days from receipt to approval to sit for exam 15 days from passing exam to issuance of license
RENEWALS
Renewals Processed: Quarter 1 (July–Sep): 205 renewals Quarter 2 (Oct–Dec): 207 renewals TOTAL: 412
Processing Timeline: Quarter 1 (July–Sep): 27 days Quarter 2 (Oct–Dec): 15 days

ENFORCEMENT STATISTICS FISCAL YEAR 2021–22
COMPLAINTS RECEIVED
57
COMPLAINTS CLOSED
Opened in FY 18–19: 3 Opened in FY 19–20: 34 Opened in FY 20–21: 17 Opened in FY 21–22: 17 TOTAL CLOSED: 71
AVERAGE DAYS TO CLOSE
466
COMPLAINTS PENDING
Opened in FY 18–19: 5 Opened in FY 19–20: 9 Opened in FY 20–21: 45 Opened in FY 21–22: 40 TOTAL PENDING: 99
CITATIONS ISSUED
0
ATTORNEY GENERAL CASES INITIATED
0



OUTREACH EVENTS

Since the last Advisory meeting

- January 12, 2022 – SacFAST Virtual Presentation.

Upcoming Events

- None.

Goal 4: Professional Education

Enhance consumer protection through initial and continuing education requirements for licensees.

4.1 Determine the feasibility of restructuring the Continuing Education requirements to align course content with professional fiduciary practice.

4.2 Develop guidelines for approving Continuing Education providers to increase consistency and efficiency in the approval process.

4.3 Oversee the development of the professional fiduciary's code of ethics training to promote licensee awareness and compliance.

Goal 5: Regulation and Legislation

Protect consumers by enhancing regulation and legislation to meet evolving industry challenges.

5.1 Review and amend laws and regulations for clarity and licensee understanding of the laws and regulations governing the practice of a professional fiduciary.

5.2 Identify statutory and regulatory proposals to strengthen the Professional Fiduciary Act.

5.3 Promulgate regulations related to inactive and retired license status to accurately reflect licensee status.

5.4 Promulgate regulations related to client notification to protect consumers by informing them of the Bureau's contact information.

5.5 Promulgate disciplinary guidelines to standardize sanctions in disciplinary cases.

Goal 6: Administration

Efficiently use resources and personnel to meet Bureau goals and objectives.

6.1 Explore ways to utilize the Advisory Committee members to benefit from their expertise.

6.2 Monitor budget and staffing to achieve Bureau's licensing, education, and enforcement mandates.

6.3 Develop and implement internal procedural manuals for continuity and workforce succession planning.

6.4 Establish ongoing training plan with the Department of Consumer Affairs' Consumer Information Center staff to effectively respond to inquiries.

6.5 Pursue opportunities for staff training relating to the fiduciary profession to increase knowledge about the practice.

Goal 3: Communication and Outreach

Proactively inform consumers and licensees about the practice, regulation, and developments that affect the fiduciary profession.

3.5 Collaborate to identify opportunities for participation in outreach events to increase awareness of the Bureau and the fiduciary profession.