



WHAT YOU SHOULD KNOW BEFORE HIRING A PROFESSIONAL FIDUCIARY

DEPARTMENT OF CONSUMER AFFAIRS



PROFESSIONAL FIDUCIARIES BUREAU

Professional Fiduciaries Bureau

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Before hiring a professional fiduciary, you should interview at least three licensed professional fiduciaries and verify they are licensed by visiting the Bureau's website at **www.fiduciary.ca.gov**. You can do searches by using the person's name, license number, city, or county. You can also view any publicly available disciplinary information on the website.

The following are examples of interview questions to ask before becoming a client.

- ☐ What types of services do you provide?
- ☐ Are you insured for errors and omissions?
- ☐ What credentials do you have?
- ☐ What are your office and phone hours?
- ☐ If there is an emergency after hours, how do I reach you or your staff?
- ☐ What are your internal controls? How is my confidential information protected?
- ☐ What happens to me if something happens to you? What is your succession plan?
- ☐ Do you have a disaster-recovery plan for my data?
- ☐ What fees do you charge and when?
- ☐ If you use other professionals (certified public accountant, attorney, caregiver, etc.), what are their fees?
- ☐ Do you work alone or have a staff?
- ☐ If you have a staff, what types of services do you delegate to them?
- ☐ What is the fee for services provided by your staff?
- ☐ How often will you provide me with an accounting?
- ☐ Can you provide me with references of past or current clients or other professionals you have worked with who I can contact?