

DEPARTMENT OF CONSUMER AFFAIRS



PROFESSIONAL FIDUCIARIES BUREAU



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WHAT YOU SHOULD KNOW BEFORE HIRING A PROFESSIONAL FIDUCIARY



Before hiring a Professional Fiduciary, you should interview at least three licensed Professional Fiduciaries. The following are examples of interview questions to ask before becoming a client.

- What type of services do you provide?
- Are you insured for errors and omissions?
- What credentials do you have?
- What are your office and telephone hours?
- If there is an emergency after hours, how do I reach you or your staff?
- What are your internal controls like? 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?