



DEPARTMENT OF CONSUMER AFFAIRS



PROFESSIONAL FIDUCIARIES BUREAU

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Email: fiduciary@dca.ca.gov
Website: www.fiduciary.ca.gov

ATTENTION LICENSEES

Renew Your License On Time!

Renew your license on time to avoid administrative or disciplinary action. If your license is expired for more than 30 days, you will be assessed a delinquent fee. Business and Professions Code section 6562.5 requires a written notification to the Bureau if you do not intend to renew your license.





Annual Statement Requirements

- ☐ Include your business, public, and home addresses.
- ☐ Report the aggregate value of client assets under your management as a professional fiduciary.
- ☐ Report all cases opened or closed since the date of your last annual statement submitted to the Bureau.
- ☐ Include case type, full case/client name, and the opened or closed date. For court appointed cases, include the case number and court location.
- ☐ Report all fiduciary actions and provide supporting documents as required per the Annual Statement.
- ☐ Sign and date your annual statement.

Renewal Requirements

- ☐ Submit your complete and accurate annual statement 60 days prior to the expiration date of your license. Email to **PFBrenewals@dca.ca.gov**.
- ☐ Complete 15 hours of continuing education. This training should include two hours of training in ethics, cultural competency, or a combination of ethics and cultural competency.
- ☐ Renewal processing time is four to six weeks.

Go to **www.fiduciary.ca.gov** for more information on licensing and renewals or to join the Bureau's email list.



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