

PROFESSIONAL FIDUCIARIES BUREAU SEEKING SUBJECT MATTER EXPERTS

The Professional Fiduciaries Bureau established its expert consultant program in 2011 as an impartial and professional way to support the investigation and enforcement functions of the Bureau. Expert consultants provide expert reviews and opinions on complex complaints received by the Bureau.

To be an expert consultant for the Bureau, you must meet the following minimum criteria:

1. Possess a current California professional fiduciary license in good standing for the previous five years;
2. Have no prior or pending administrative or disciplinary actions;
3. Have an active fiduciary practice with a current case load with at least three clients during your career as a licensed professional fiduciary; and,
4. Possess in-depth knowledge of fiduciary work (trusts, conservatorships, durable power of attorney, and/or guardianships) and the professional fiduciary industry's best practices.

The Bureau has set the reimbursement rate for fiduciaries conducting case reviews and report writing at \$75 per hour and \$90 per hour for providing expert testimony at an Administrative Hearing. To apply, or if you have any questions, please email fiduciary@dca.ca.gov.