

Professional Fiduciary Management



Program FAQs

What is a Professional Fiduciary?

A person who acts as a conservator or guardian for two or more persons, at the same time, who are not related to the professional fiduciary or to each other by blood, adoption, marriage, or registered domestic partnership. It also includes a person who acts as a trustee, agent under a durable power of attorney for health care, or agent under a durable power of attorney for finances, for more than three individuals, at the same time.

For full definition, [click here](#).

Do Professional Fiduciaries need to be licensed?

The Professional Fiduciaries Act signed into law in California mandates that all Professional Fiduciaries be licensed. There are however, certain professions that are exempt.

For full licensing requirements, [click here](#).

Is the Professional Fiduciary Management Program at Cal State Fullerton approved to offer pre-licensing education?

Yes. As part of the criteria to apply for licensure with California, individuals must obtain 30-hours of pre-licensing education from an approved provider. Cal State Fullerton is approved by the California Professional Fiduciaries Bureau as an educational provider.

Do I need to take the entire certificate program to meet the pre-licensing education requirements to take the licensing exam?

No. The California Professional Fiduciaries Bureau requires that individuals complete a minimum of 30 hours of pre-licensing education, which is the equivalent of two courses. Students do not need to take the entire certificate program to qualify for licensure.

If I only need 30 hours of pre-licensing education, what is the benefit of taking the entire certificate program?

Completing the entire certificate program provides licensing candidates with enhanced credibility that will improve the marketability and employability of those wishing to enter the profession. It demonstrates that you have successfully completed a course of study and have taken beyond the minimum number of pre-licensing education hours. In addition, it better prepares students to take the CA state licensing exam.

Registration & Eligibility FAQs

When do I register?

The courses fill up quickly and early registration is highly recommended. Registration for spring opens in November, summer registration opens in March, and fall registration opens in July. Please contact EIPconnect@fullerton.edu for exact dates.

How do I register?

There are three ways to register: [Online](#), by phone at 657.278.2611, or in-person (2600 Nutwood Ave, Suite 100, Fullerton).

Do I need approval to enroll?

The program is open to anyone, however, to be eligible for a certificate upon completion of the program, you must submit proof of one of the following to us at fiduciary@fullerton.edu:

- Bachelor's degree from an accredited University; **OR**
- At least 60 semester units of college level work; **OR**
- At least 5 years of experience working in fiduciary management or geriatric care

*The California State University, Fullerton, Extension and International Programs (EIP) does not guarantee that students who meet the eligibility requirements for the Professional Fiduciary Management certificate program are eligible to take the state licensing exam. It is the student's responsibility to perform due diligence and review the licensing requirements listed in section 6530-6541 of the California Business and Professions Code found here: http://www.fiduciary.ca.gov/laws_regs/act.shtml. Out-of-state students taking the courses may be subject to different requirements.

What if I don't meet the eligibility requirements. Can I still enroll?

If you do not meet the eligibility requirements you may still enroll in the courses, however, you will not be eligible to receive a certificate.

The class is closed, what do I do?

If a class is closed you may contact Student Services at (657) 278-2611 and request to be added to the waitlist. The waitlist does not guarantee you will be enrolled in the class.

When are the courses offered?

We make every attempt to offer each course in the program at least once every semester. However, the schedule may vary. [Check our website](#) for the most updated schedule.

Course Prerequisite FAQs

Prerequisite Course	Courses in Program
None	Standards and Practices in Professional Fiduciary Management
Standards and Practices in Professional Fiduciary Management	<ul style="list-style-type: none"> Trust Administration and Management Accounting and Recording Keeping for Positions of Trust Conservatorship of Protected Persons and Advanced Health Care Directives
<ul style="list-style-type: none"> Standards and Practices in Professional Fiduciary Management Trust Administration and Management 	Management of the Investment Portfolio

Standards and Practices in Professional Fiduciary Management is the first class in the program and the prerequisite for the subsequent courses. Can I take Standard and Practices concurrently with the other courses?

No, we do not allow concurrent enrollment for this program. We do our best to ensure students are successful in the program and we make every attempt to stagger the courses.

Do I need to complete the prerequisite courses prior to enrolling in the subsequent courses?

Yes, you need to complete the prerequisite course, however, you can enroll in multiple courses pending a passing grade in the prerequisite course. Also, the prerequisite course start date must precede the start date of the subsequent courses.

What order should I take the courses?

Once you have completed the Standards and Practices course you can take Trust Administration, Accounting and Record Keeping, and/or Conservatorship of Protected Persons. Once you have completed Standards and Practices and Trust Administration, you can take Management of the Investment Portfolio. Once students have fulfilled the appropriate prerequisites, there is no specific order they need to take Accounting and Record Keeping, Conservatorship of Protected Persons, and Management of the Investment Portfolio.

*Please note, students have reported the following three courses listed below to be among the most challenging of the courses in the program. If you have little or no background in investment management and court accounting, we recommend taking these courses when you can commit the time needed to tackle these topic areas.

- Accounting and Record Keeping for Positions of Trust
- Conservatorship of Protected Persons and Advanced Health Care Directives
- Management of the Investment Portfolio

I'm looking at the course schedule and some of the courses start before Standards and Practices. If Standards and Practices is a prerequisite, how can I enroll in these courses?

We normally have two cohorts of students each term. The first cohort enters the program at the beginning of the term and the second cohort enters the program in the middle of the term. Class start dates that are scheduled before the prerequisite courses are intended for the students who began the program in the previous term.

Can I enroll in one of the courses without having first taken the course prerequisite?

Possibly, if you have completed a course from a higher education institution with the course equivalent and provide us at fiduciary@fullerton.edu with a transcript and syllabus from that course prior to registering. Please note, determining the course equivalent can take several weeks for approval.

I have a MBA and/or am a CPA. I would like to take the Accounting and Record Keeping class before having taken the Standards and Practices course.

Court accounting is very different from regular accounting and many students with a strong accounting background find the course demanding. If you have experience with court accounting, please email us at fiduciary@fullerton.edu with your resume. Your information will be forwarded to the instructor for their review; this process could take several weeks for review.

Course Format FAQs

Are all the classes online?

Yes, all of the Fiduciary courses are offered online. This format provides flexibility for the working professional as well as long distance students.

How do I know if online learning is right for me?

Use the following checklist to see if online learning is right for you:

1. Are you self-motivated?

Online distance learning is self-directed learning. It requires a high level of responsibility, dedication and self-discipline on the part of the student. During the courses, students are expected to achieve the course objectives and are graded on achievement not effort. You are responsible for your own work, your own progress and your own grade. In order to succeed, you need to log into the course regularly to access course content and participate in discussions.

2. Are you familiar with the Internet and written communication?

You will do the bulk of your class work online. Most of your communication with your instructor and classmates will be through email/written communication. Through conscientious writing in emails, discussion board, etc., you will establish a camaraderie with your cohort (the students going through the program with you). Your written communication skills will be polished through these exercises.

3. Does your computer equipment and software need updating?

Check our list of [Technical Recommendations](#) to see if you have what is needed to be successful.

I have never taken an online course before, how do I prepare?

It is HIGHLY recommended that all new students who have not taken an online course at the University and are not familiar with TITANium (Moodle) review the [online tutorial](#). Also, it is HIGHLY recommended that students taking the **Accounting and Record Keeping for Positions of Trust** have a BASIC knowledge of Microsoft Excel including formulas and functions, navigation and views, and formatting.

How are the online classes structured?

Upon the start of your course, each week the instructor will release a module containing course readings, video lectures, discussion board topics, quizzes, assignments, etc. for you to read and complete within that week. You are expected to go through the materials and complete all the activities within the time window the instructor has allocated and log in to your course **at least once a week**.

The online course will have approximately three - five hours worth of content and activities per week that you will be responsible for.

Exam Prep & Licensing Application Information

I've completed my 30 hours of pre-licensing education, now what?

To apply for the licensing exam, [click here](#) to review the Center for Guardianship Certification CA Professional Fiduciary Licensing Exam How to Apply PDF. Also, [click here](#) to review the CGC California Examination Handbook.

The Center for Guardianship Certification is requesting an affidavit of course completion from Cal State Fullerton. Who do I contact?

To request an affidavit, please go to Cal State Fullerton's Professional Fiduciary Management [website](#) and click on "[Request Your Affidavit](#)" and fill in the information. The request will take between 1-2 weeks to complete. Cal State Fullerton will send the completed affidavit directly to the CGC and cc the student.

What can I do to prepare for the exam?

You can review the CA [exam core competencies](#) to help prepare for the exam.