

# APPLYING TO BECOME AN OREGON CERTIFIED PROFESSIONAL FIDUCIARY

## Step-by-step instructions

**Oregon Certified Professional Fiduciary Certification** is a voluntary program administered through the Center for Guardianship Certification. You must be a National Certified Guardian (NCG) to become an Oregon Certified Professional Fiduciary (OCPF). Taking both the national test and Oregon test for certification is permitted but you have to pass the national test before being recognized as an Oregon Certified Professional Fiduciary. *Oregon Certified Professional Fiduciary Certification is not required under Oregon Law. It is not required for court appointment as a guardian, conservator or trustee.*

### Application Form Instructions, Checklist, and Deadlines

The following 2 Oregon Certified Professional Fiduciary forms are required for submission for OCPF Certification. Requested supporting documentation is also required.

1. NCG and Oregon Certified Professional Fiduciary Application
2. Oregon Certified Professional Fiduciary Professional Education/Training Credits Form

### Oregon Certified Professional Fiduciary Application

In order to be approved to sit for the Oregon Certified Professional Fiduciary examination, you must complete the following items:

Online Application/Payment – All details must be completed and required forms uploaded for application to be considered. The application will require you to complete and send proof of the following items:

- Contact Information
- Licenses and Certificates
- College Degree and Experience Qualifications

This section requires you to select one of two options for meeting the OCPF criteria. College degree and experience qualification options to select from include:

- have a BA/BS degree from an accredited educational institution in the field of legal, health, social, or financial services with a minimum of 1 year experience practicing as a **fiduciary\*** or court-appointed named trustee with 2 or more unrelated clients. (Documentation required – proof of college degree and copies of court appointments.)  
**OR**
- have an AA degree from an accredited educational institution with 3 years of relevant experience in the field of legal, health, social, or financial services including a minimum of 1 year experience practicing as a **fiduciary\*** or court-appointed named trustee with 2 or more clients unrelated to you. (Documentation required – proof of a college degree, resume with employer/supervisor contact information covering 3 years of relevant experience and copies of court appointments.)

- Professional Education/Training Hours CEU Form

This section requires that all applicants have 32 hours of documented education/training, in the two years prior to the application date including:

- at least 3 documented hours in each of the following areas of legal, ethics, health/medical, social and financial services.
- 6 hours minimum of guardianship/conservatorship training sponsored by the Guardian/Conservator Association of Oregon, the National Guardianship Association or the Oregon Law Institute.
- All other credits need to be provided by an accredited educational institution or accredited professional organization/association. (Documentation required - CEU certificates, signed by continuing education entity.) All other credits need to be provided

by an **accredited educational institution or accredited professional organization/association**, including but not limited to: The Guardian/Conservator Association of Oregon, The National Guardianship Association, The Oregon State Bar, The Oregon Law Institute, The National Association of Social Workers, The Oregon Gerontological Association, The Certified Financial Planner Board of Standards, The Oregon Board of Registered Nursing, The Oregon Board of Psychology, The Oregon Department of Health and Human Services, The American Society of Aging, The National College of Probate Judges, The National Academy of Elder Law Attorneys, National Board of Certified Counselors.

- Verification and affirmation of minimum requirements for an NCG

Affidavits of Employment and/or Experience – These pdf documents must be downloaded and given to a third party to complete and return to CGC on your behalf.

Signature Pages – These pages are available on the CGC Oregon Application homepage and must be downloaded and returned to CGC offices.

Letters of Appointment/Court Documents – Oregon requires you to provide copies of Letters of Appointment serving as a fiduciary. These court documents must be submitted to CGC along with your signature pages.

*\*ORS 125.005(2) "Fiduciary" means a guardian or conservator appointed under the provisions of this chapter or any other person appointed by a court to assume duties with respect to a protected person under the provisions of this chapter.*