



CA Professional Fiduciary Licensing Exam How to Apply

The following document is intended to outline the steps one must take to apply for the California Professional Fiduciary Licensing Exam. We hope you will find this document useful.

1. To take the exam, the candidate must first get approval from the Professional Fiduciary Bureau. To do so, download the licensing application package found on the Bureau website at www.fiduciary.ca.gov or contact the Bureau directly at (916) 574-7340.
2. The candidate must submit a complete licensing application package to the Bureau by mail to be approved to sit for the exam.
3. Once approved to take the exam, the Bureau will notify the candidate that they are eligible for a period of twelve (12) months to take and pass the exam.
4. Upon notification of eligibility by the Bureau, the candidate must contact the Center for Guardianship Certification (CGC) by visiting the website at www.guardianshipcert.org to apply for the exam.
5. The candidate will complete the CGC CA Professional Fiduciary exam application found on the CGC website. The candidate must also complete a criminal background check, employment and education verifications along with payment of \$275 by credit card, to CGC.
6. Once CGC has received the exam application and payment, the candidate will receive a "CA Professional Fiduciaries Licensing Examination, Candidate Information Bulletin (CIB)" from the testing center outlining the exam process.
7. As noted in the CIB, the candidate is responsible for working directly with the testing centers in scheduling the time and location to sit for the exam and any re-exam. The candidate must remit a \$33 fee to the exam site each time they sit for the exam.
8. The exam consists of two parts, one part that is national in scope and one part that is specific to California law. To pass the exam an eligible candidate shall receive passing scores on both parts. The candidate will be given five times within the 12-month eligibility period to pass the exam not to exceed one re-exam attempt every thirty (30) days within the eligibility period.
9. After taking the exam, CGC will notify the candidate of their pass or fail status on both sections of the exam on the CGC website and via e-mail or hard copy letter.

10. If the candidate passes the national portion, CGC will issue a National Certified Guardian Certificate.
11. If the candidate fails either or both parts of the exam, they must retake only the failed portion(s). Until such time as both parts are passed, the candidate will not be approved for licensure. To retake the exam, the candidate must complete another CGC exam application and remit the appropriate fee.
12. If the candidate passes both parts of the exam and has fulfilled all the requirements for licensing, the Bureau will notify the candidate that they are approved for licensure, upon receipt of the licensing fee, the Bureau will issue the candidate a license certificate as a professional fiduciary.

If you need special accommodations in order to take the exam, please complete the Special Accommodations Form located on the homepage of the CGC website at www.guardianshipcert.org