



ATTENTION LICENSEES

Be Sure Your License Is Renewed On Time!

If you do not renew your license on time, it affects the status of your license. Although you have a 30-day grace period, after that, your license will be designated as “Delinquent” on the Professional Fiduciaries Bureau website. Courts, by law, cannot assign a case or allow a case to continue with a Professional Fiduciary whose license has expired.



DEPARTMENT OF CONSUMER AFFAIRS

PEFB

PROFESSIONAL FIDUCIARIES BUREAU

www.fiduciary.ca.gov



DO's

- Submit your Annual Statement 60 days prior to the expiration date of your license.
- Complete all sections of your Annual Statement as required in section 4542 of the California Code of Regulations.
- Complete 15 hours of continuing education, complete your detachable renewal application (sign and date), and mail it to the Bureau with your \$700 renewal fee by the expiration date of your license.
- Remember the renewal processing time is 4–6 weeks.

DON'Ts

- Forget to report your home address in Part 1 of the Annual Statement.
- Forget to report the value of client assets under management in Part 3 of the Annual Statement.
- Forget to report ONLY cases closed or opened (include dates) since the date of your last statement in Part 3 of the Annual Statement.
- Forget to attach any explanation and/or court document for Part 5 of the Annual Statement.
- Forget to sign and date Part 6 of the Annual Statement.
- Forget all approved education providers can be used for pre-license and continuing education.

For questions or more information, please contact Angela Bigelow at (916) 574-7341.

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