



PSI licensure:certification

3210 E Tropicana
Las Vegas, NV 89121
www.psiexams.com

*Before scheduling
your examination,
be sure you understand
the contents of this bulletin.
Please retain and use it as a
reference when contacting PSI.*

California Professional Fiduciary Licensing Examination



CANDIDATE INFORMATION BULLETIN

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Please refer to our web site to check for the most updated information at www.psiexams.com.

ABOUT THE EXAMINATION

Passing the California Professional Fiduciary Licensing Examination is mandatory for licensure as a professional fiduciary in the State of California. The purpose of the examination is to protect consumers by identifying professional fiduciaries that are competent to assume and maintain the responsibilities of managing fiduciary services.

The licensing agency is the Professional Fiduciaries Bureau (Bureau) within the California Department of Consumer Affairs (Department). All questions regarding licensing should be directed to:

Professional Fiduciaries Bureau
P.O. Box 989005
West Sacramento, CA 95798-9005
(916) 574-7340
www.fiduciary.ca.gov
fiduciary@dca.ca.gov

The Center for Guardianship Certification (CGC) is responsible for the development and maintenance of the licensing examination for California Professional Fiduciaries. Furthermore, CGC is responsible to ensure that examination validation testing and measurement methodologies are in compliance with professional standards and California law. This produces an examination that is psychometrically sound and legally defensible.

Ongoing maintenance of the examination by CGC keeps the examination current and accurately measures competency in the required knowledge areas.

All questions regarding the examination should be directed to:

Center for Guardianship Certification
P.O. Box 5704
Harrisburg, PA 17110-5704
(717) 238-4689
<http://www.guardianshipcert.org/>

EXAMINATION ADMINISTRATION

PSI has contracted to administer the California Professional Fiduciary Licensing Examination. PSI provides testing through a network of computer examination centers in California and some out of state sites.

All questions regarding the administration of the examination by PSI or scheduling should be directed to:

PSI licensure:certification
3210 E Tropicana
Las Vegas, NV 89121
(877) 392-6422 • Fax (702) 932-2666
www.psiexams.com

EXAMINATION FORMAT

The examination consists of two parts: one part that is national in scope and one part that is specific to California law. To pass the examination you must receive passing scores on both portions. You will have one hour on each part of the examination.

PASSING THE EXAMINATION

The passing score is based upon minimally acceptable competence criteria that represents the skills required for entry-level practice. The passing score is established by CGC. Passing the examination is required before licensure.

After taking the examination, the Bureau will notify you of your pass status on both sections of the exam via a mailed letter. Once you pass both parts of the examination and fulfill all requirements of the Licensing Application Package, the Bureau will notify you of your approval for licensure. You may also retrieve your examination results from the CGC website by using the examination results number issued to you by CGC.

Upon approval and receipt of the licensing fee, the Bureau will issue you a licensing certificate as a California Professional Fiduciary. When you pass the national portion, CGC will certify you as a Registered Guardian.

APPLYING FOR THE EXAMINATION

To take the examination you must follow these three steps:

First, submit a Licensing Application Package to the Bureau for a determination of eligibility. To receive a Licensing Application Package, visit the Bureau's website at www.fiduciary.ca.gov, or contact the Bureau directly at (916) 574-7340. Once approved to take the examination, the Bureau will issue you an examination eligibility number. You will be eligible for twelve (12) months to take and pass the examination.

Once eligible, submit an Examination Application to CGC. You may download the application off the CGC website at <http://www.guardianshipcert.org/> and submit it completed along with the application fee directly to CGC.

Finally, contact PSI to schedule the examination. You will need your examination eligibility number to complete this process.

SCHEDULING THE EXAMINATION

MAKING AN APPOINTMENT

PSI is responsible for the administration and scheduling of the examination. You may make an appointment to take the examination via the Internet at www.psiexams.com, or by telephone at (877) 392-6422. You must have your examination eligibility number to schedule your appointment.

In most California testing centers, testing does not take place on the following major holidays:

Independence Day	Closed July 4, 2018
Labor Day	Closed September 3, 2018
Thanksgiving	Closed November 22-23, 2018
Christmas	Closed December 24-25, 2018
New Years Day	Closed January 1, 2019
Martin Luther King Jr.	Closed January 21, 2019
Memorial Day	Closed May 27, 2019
Independence Day	Closed July 4, 2019



INTERNET SCHEDULING

You may schedule the examination over the Internet 24 hours a day. The process to register and schedule an appointment for the examination over the Internet is as follows:

- You must complete the PSI [Test Registration Form](#) that is available online at the PSI website, www.psiexams.com, by submitting your examination eligibility number, providing your desired examination site and date, and remitting the \$30.50 testing fee to PSI.
- PSI will give you available dates for scheduling your examination at one of the examination sites within five days of your requested date.
- You must choose an examination appointment date to complete your registration.

TELEPHONE SCHEDULING

Call PSI at (877) 392-6422, Monday through Friday between 4:30 AM and 7:00 PM, and Saturday-Sunday between 6:00 AM and 2:30 PM, Pacific Time, to schedule your appointment for the test. You must provide your examination eligibility number. TDD service is available at (800) 735-2929.

RE-TAKING THE EXAMINATION

You may re-take the examination a total of four times not to exceed one examination attempt every thirty (30) days within your 12-month eligibility period as determined by the Bureau.

If you fail one or both portions of the examination, you must re-take the failed portion(s). To re-take any portion of the examination, you must first complete a new CGC Examination Application and remit the appropriate fee to CGC. You must then contact PSI to schedule a new appointment to take the examination. You are responsible for paying the sitting fee to PSI for each re-take: \$22.50 (for one portion) or \$30.50 (for two portions).

CANCELING AN EXAMINATION APPOINTMENT

You may cancel and reschedule an examination appointment without forfeiting your fee *if your cancellation notice is received two (2) days prior to the scheduled examination date*. For example, for a 9:00 a.m. Monday appointment, the cancellation notice would need to be received before 9:00 a.m. on the previous Saturday. You may call PSI at (877) 392-6422.

Note: A voicemail or email message is NOT an acceptable form of cancellation. Please use the PSI Website or call PSI and speak directly to a Customer Service Representative.

MISSED APPOINTMENT OR LATE CANCELLATION

If you miss your appointment, you will not be able to take the examination as scheduled. You will forfeit your examination fee, if:

1. You do not cancel your appointment two days before the scheduled examination date;
2. You do not appear for your examination appointment;
3. You arrive after your examination start time; or
4. You do not present proper identification when you arrive for the examination.

EXAMINATION SITE CLOSING FOR AN EMERGENCY

In the event that severe weather or another emergency forces the closure of an examination site on a scheduled examination date, your examination will be rescheduled. PSI personnel will attempt to contact you in this situation. However, you may check the status of your examination schedule by calling PSI ahead of time. Every effort will be made to reschedule your examination at a convenient time as soon as possible. You will not be penalized. You will be rescheduled at no additional charge.

SPECIAL ACCOMMODATIONS

CGC is responsible for the determination and approval of all special accommodation requests.

If you have a physical or mental impairment that substantially limits a major life activity you may be eligible for special accommodations in the testing process to assure that the tests accurately reflects your competency in the required knowledge areas. "Major life activities" include walking, seeing, hearing, speaking, breathing, learning, working, caring for oneself, and performing manual tasks.

If you require special accommodations, you must submit a completed [Special Accommodations Request Form](#) to CGC for approval. You may obtain the form off the CGC website at <http://www.guardianshipcert.org/> or by contacting CGC at (717) 238-4689 to request one. This form requires you to describe the nature of your disability and its limitations related to the examination, the type of accommodation or modification requested, and supporting documentation. The supporting documentation must bear the name, professional title, original signature, license number and telephone number of your physician, medical authority or other qualified professional.

PSI is fully compliant with the Americans with Disabilities Act and provides reasonable accommodations for candidates whose request for special accommodations has been granted by CGC. Reasonable accommodations are those that do not fundamentally alter the examination or results. Any auxiliary aids and services provided must be approved by CGC. Scheduling services are available for the hearing-impaired via PSI's Telecommunications Device for the Deaf (TDD) by calling (800) 735-2929.



REPORTING TO EXAMINATION SITE

On the day of the examination, you must arrive at least thirty (30) minutes prior to your scheduled appointment time. This allows time for check-in and identification verification and provides time to familiarize yourself with the examination process. If you arrive late, you may not be admitted to the examination site and you may forfeit your examination registration fee. Even though candidates will be thumb printed, you are still required to comply with any identification requirements established by the appropriate regulatory entity.

REQUIRED IDENTIFICATION AT THE EXAMINATION SITE

You must provide one of the following valid forms of government-issued identification before you may examine:

1. An unexpired State issued driver's license;
2. An unexpired State Department of Motor Vehicles Identification Card;
3. A current U.S. military-issued identification card;
4. An unexpired passport; or
5. A U.S. Government-issued passport card.

All photographs must be recognizable as the person to whom the identification card was issued. The name on the application must match the photographic I.D. card.

Failure to provide the required identification at the time of the examination without notifying PSI is considered a missed appointment, and you will not be able to take the examination.

IMPORTANT INFORMATION ABOUT TAKING AN EXAMINATION

1. All candidates will have their thumbprint taken during examination check-in. The thumb print must be matched after candidates return from a restroom break and any time the candidate leaves and returns to the test site after check-in.
2. The temperature in the testing room is maintained at a moderate level. Candidates are advised to layer clothing. Acceptable layered clothing includes lightweight shirts, sweaters, and pullovers without pockets or hoods. These items must be worn upon check-in, while you wait to enter the testing room, and during your initial seating for the examination. If the layered item is removed during the examination, you will be required to store it in the lobby while time continues to count down on your examination. Outerwear (coats, heavy jackets, vests, shawls, scarves, etc.) is not allowed in the testing rooms.
3. There are timing mechanisms available in the testing room and on the computer console to help candidates keep track of time during the test administration. Candidates are not permitted to bring watches or other timekeeping devices into the testing rooms.
4. Only one candidate will be allowed to take a restroom break at a time. Candidates are required to sign out when leaving and returning to the testing

room. If a candidate's restroom break takes longer than 5 (five) minutes, a proctor will check on the candidate and will notify the applicable regulatory entity of the occurrence. The regulatory entity will investigate and take appropriate action.

5. The following is a non-exhaustive list of personal items that are not permitted in the testing rooms:

Purses	Briefcases/daypacks/luggage
Cellular phones	Pagers
Drinks (including water)	Food/candy/snacks/gum
Good luck items	Luggage
Calculators	Reading materials
Textbooks	Notes
Any recording device	Smart devices
Electronic devices	Headphones or earphones/earbuds
Personal pens or pencils	Therapeutic items
Cameras	Over-the-counter medication
Weapons	Fashion scarves
Hats/baseball caps/visors*	Sunglasses**
Bulky, large or noisy jewelry***	Prescription drugs****

**Headwear worn for religious purposes is subject to inspection.*

***Prescription and non-prescription eyeglasses may not be worn for the photo. Eyeglasses subject to inspection.*

****Jewelry that is allowed into the examination room is subject to inspection.*

*****Drugs that are medically necessary during the pendency of the examination may be brought into the examination site, in a container bearing a proper prescription label with the name of the candidate and of the drug; any such medication is subject to examination by a proctor upon check-in.*

Examination proctors will have considerable discretion to refuse permission of clothing and/or items that compromise the integrity or security of the examination.

During the check-in process, all candidates will be asked if they possess any of the prohibited items and all candidates will be asked to empty their pockets. If prohibited items are found during check-in, candidates must return these items to their vehicle or other place of safekeeping. Neither PSI nor the Department of Consumer Affairs will be responsible for the items. Any candidate possessing prohibited items in the testing room will have his or her examination results invalidated, and PSI will notify the appropriate regulatory entity of the occurrence.

6. Shoes must be worn at all times and feet are not permitted on the chairs. Feet must remain on the floor during examinations.
7. Copying any portion of the examination content by any means, or communicating examination content for the purpose of aiding its unauthorized reproduction, whether before, during, or after the examination, is a violation of PSI security policy and existing law. Either one may result in the disqualification or invalidation of examination results, the denial of your license, and may result in criminal prosecution.



8. If a candidate is asked by a proctor to step into the lobby during your examination, the proctor will suspend the candidate's examination, so all remaining test time will be retained.

has run out or you have ended the first session of the examination you may not return to that portion.

Only candidates, and those individuals with prior regulatory entity approval, are allowed to be present in the testing sites.

If candidates require that an exception be made to ANY of the abovementioned security procedures, candidates must contact their regulatory entity PRIOR to the date of their examination. The regulatory entity must provide the exception to PSI. NO EXCEPTIONS WILL BE MADE ON THE DAY OF THE EXAMINATION.

EXAMINATION BY COMPUTER

The examination will be administered via computer. You will be using a mouse and computer keyboard.

IDENTIFICATION SCREEN

You will be directed to a semiprivate testing station to take the examination. When you are seated at the testing station, you will be prompted to confirm your name, identification number, and the examination for which you are registered.

TUTORIAL

Before you start your examination, an introductory tutorial is provided on the computer screen. The time you spend on this tutorial, up to 15 minutes, DOES NOT count as part of your examination time. Sample questions are included following the tutorial so that you may practice answering questions, and reviewing your answers.

TEST QUESTION SCREEN

The "function far" at the top of the test question screen provides mouse-click access to the features available while taking the examination.



The screenshot shows a web-based examination interface. At the top, there is a navigation bar with icons for Mark, Comments, Goto, Help, and End. Below this is a status bar displaying: Question: 3 of 40, Answered: 2, Unanswered: 1, Marked: 0, View: All, and Time Left(Min): 359. The main content area contains a question: "3. What do the stars on the United States of America's flag represent?". Below the question is a text input field. Underneath the input field, it says "(Choose from the following options)". There are four radio button options: "1. Presidents", "2. Colonies", "3. States", and "4. Wars". At the bottom of the question area, there are two buttons: "<< Back" and "Next >>".

One question appears on the screen at a time. During the examination, minutes remaining will be displayed at the top of the screen and updated as you record your answers.

IMPORTANT: You have one hour to take each portion of the examination. Within each portion, after you have entered your responses, you will later be able to return to any question(s) and change your response, provided there is still time left on that portion of the examination. Once the time

EXAMINATION CONTENT

KNOWLEDGE AREAS

The examination requires you to demonstrate a basic understanding of responsibilities of serving as a professional fiduciary in California. Following is the outline that identifies particular knowledge areas of the examination:

EXAMINATION OUTLINE

1. **Professional Practices:** Knowledge and application of fiduciary principles as they relate to the professional roles of the fiduciary. (16.6%)
 - CA Code of Ethics, NGA Standards of Practice
 - Alternatives to court-appointed fiduciaries
 - Working with a co-fiduciary
 - Confidentiality
 - Conflict of interest
 - Management of fiduciary practice/risk management
 - Fees

2. **Conservatees:** Knowledge of the personal aspects of a conservatee's life and the ability to address those special situations or circumstances affecting the conservatee. (12.6%)
 - Cultural/religious diversity
 - Mental illness/disabilities
 - LPS Conservatorships
 - Difficult clients
 - Family dynamics and concerns
 - Social history, values and beliefs of conservatee

3. **Surrogate decision-making:** Knowledge and application of decision-making principles and limitations in making surrogate decisions. (10.6%)
 - Functional assessment
 - Informed consent
 - Least restrictive alternatives
 - Capacity
 - Limits to fiduciary's authority
 - Fiduciary responsibilities

4. **Legal and courts:** Knowledge and application of laws, courts and legal processes governing fiduciary relationships. (14%)
 - Due process
 - Conservatee's rights
 - Relationship with other officers of the court
 - Court supervision, sanctions, surcharge
 - Modification of conservatorships or trusts, successors
 - Compliance with monitoring systems
 - Financial powers of attorney
 - Mediation

Examination Outline Continued:

5. **Personal Management:** Knowledge and application of the responsibilities of the conservator of the person, including planning, monitoring, reporting, placement and community programs. (9%)
 - Needs assessment
 - Care plans and reports
 - Residential placement
 - Well-being oversight
 - Abuse, neglect and exploitation
 - Death of the conservatee, probate estate
 - Community and professional resources

6. **Financial Management:** Knowledge and application of the responsibilities for financial management of a client's estate and assets. (30%)
 - Inventory/marshal of estate
 - Personal property management
 - Real property management
 - Real estate sales/escrow procedures
 - Asset safekeeping and protection
 - Public benefits
 - Medicare
 - Financial planning, Medi-Cal planning
 - Trusts and trust administration
 - Prudent investor rule, investment principles
 - Consulting with other professionals

7. **Medical decision-making:** Knowledge and application of the specific issues and responsibilities surrounding surrogate medical decisions, including the ability to identify issues that have legal and ethical consequences for both the conservator and the conservatee. (7%)
 - End of life care
 - Special medical decisions/conditions
 - Medical advocacy
 - DNR/withhold/withdraw medical care
 - Durable power of attorney for health care

EXAMINATION SECURITY LAWS

BUSINESS AND PROFESSIONS CODE SECTIONS

123. It is a misdemeanor for any person to engage in any conduct which subverts or attempts to subvert any licensing examination or the administration of an examination, including, but not limited to:
- a. Conduct which violates the security of the examination materials; removing from the examination room any examination materials without authorization; the unauthorized reproduction by any means of any portion of the actual licensing examination; aiding by any means the unauthorized reproduction of any portion of the

actual licensing examination; paying or using professional or paid examination-takers for the purpose of reconstructing any portion of the licensing examination; obtaining examination questions or other examination material, except by specific authorization either before, during, or after an examination; or using or purporting to use any examination questions or materials which were improperly removed or taken from any examination for the purpose of instructing or preparing any applicant for examination; or selling, distributing, buying, receiving, or having unauthorized possession of any portion of a future, current, or previously administered licensing examination.

- b. Communicating with any other examinee during the administration of a licensing examination; copying answers from another examinee or permitting one's answers to be copied by another examinee; having in one's possession during the administration of the licensing examination any books, equipment, notes, written or printed materials, or data of any kind, other than the examination materials distributed, or otherwise authorized to be in one's possession during the examination; or impersonating any examinee or having an impersonator take the licensing examination on one's behalf.

Nothing in this section shall preclude prosecution under the authority provided for in any other provision of law.

In addition to any other penalties, a person found guilty of violating this section, shall be liable for the actual damages sustained by the agency administering the examination not to exceed ten thousand dollars (\$10,000) and the costs of litigation.

- c. If any provision of this section or the application thereof to any person or circumstances is held invalid, that invalidity shall not affect other provisions or applications of the section that can be given effect without the invalid provision or application, and to this end the provisions of this section are severable.

- 123.5 Whenever any person has engaged, or is about to engage, in any acts or practices which constitute, or will constitute, a violation of Section 123, the superior court in and for the county wherein acts or practices takes place, or are about to take place, may issue an injunction, or other appropriate order, restraining such conduct on application of a board, the Attorney General or the district attorney of the county.

The proceedings under this section shall be governed by Chapter 3 (commencing with Section 525) of Title 7 of Part 2 of the Code of Civil Procedure.

The remedy provided by this section shall be in addition to and not a limitation on, the authority provided for in any other provision of law.

- 496. A board may deny, suspend, revoke, or otherwise restrict a license on the ground that an applicant or licensee has violated Section 123 pertaining to subversion of licensing examination.

- 584. No person shall violate the security of any examination, as defined in subdivision (a) of Section 123, or impersonate, attempt to impersonate, or solicit the impersonation of, another in any examination for a license, certificate, or registration to practice as provided in this division, the Osteopathic Act, or the Chiropractic Initiative Act, or under any other law providing for the regulation of any other system or method of treating the sick or afflicted in this state.

EXAMINATION SITE LOCATIONS

PSI examination centers in California:

ANAHEIM

Park Gate Center
2301 W. LINCOLN AVE, SUITE 252
ANAHEIM, CA 92801
(714) 254-1453

DIRECTIONS FROM LA: TAKE 5 SOUTH EXIT BROOKHURST AND TURN RIGHT. TURN RIGHT ON LINCOLN (PASS A SMALL STREET NAMED MONTEREY), AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

DIRECTIONS FROM SAN DIEGO, IRVINE, MISSION VIEJO, ETC: TAKE 5N EXIT BROOKHURST AND TURN LEFT. TURN RIGHT ONTO LINCOLN (PASS A SMALL STREET NAMED MONTEREY) AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

IF BROOKHURST EXIT IS CLOSED: TAKE 5 N EXIT EUCLID AND TURN LEFT. TURN RIGHT ON LINCOLN (PASS BROOKHURST AND SMALL STREET NAMED MONTEREY) AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

*****KEEP IN MIND THAT THE EUCLID EXIT COMES FIRST AND THEN BROOKHURST.*****

OR 91 FREEWAY: TAKE 91 W EXIT BROOKHURST AND TURN LEFT. TURN RIGHT ONTO LINCOLN (PASS A SMALL STREET NAMED MONTEREY) AND GO TO THE FIRST OPEN DRIVEWAY ON THE RIGHT.

ATASCADERO

7305 MORRO RD, SUITE 201A
ATASCADERO, CA 93422
(805) 462-8983

FROM US-101 N, TAKE THE CA-41 EXIT- EXIT 219-TOWARD MORRO RD. TURN LEFT ONTO EL CAMINO REAL. Turn LEFT onto CA-41/MORRO RD.

FROM US-101 S, TAKE THE MORRO RD/CA-41 EXIT- EXIT 219, TURN RIGHT ONTO CA-41/MORRO RD.

BURBANK

2835 N. NAOMI STREET, SUITE 110
BURBANK CA 91504
(818) 566-9882

FROM I-5 SOUTH: TAKE HOLLYWOOD WAY EXIT 149. KEEP LEFT TO TAKE THE RAMP TOWARD WOODBURY UNIVERSITY. TURN LEFT ONTO N. HOLLYWOOD WAY. TURN RIGHT ONTO N. GLENOAKS BLVD. TURN RIGHT ONTO N. NAOMI ST. 2835 N NAOMI ST IS ON THE RIGHT.



FROM I-5 NORTH: TAKE BUENA VISTA STREET EXIT 148. TURN LEFT ONTO N. BUENA VISTA. TURN LEFT ONTO N. GLENOAKS BLVD. TURN LEFT ONTO N. NAOMI ST. 2835 N. NAOMI ST IS ON THE RIGHT.

CARSON

17420 AVALON BLVD, SUITE 205
CARSON, CA 90746
(310) 400-7393

FROM CA-91 E/GARDENA FWY TAKE THE AVALON EXIT. OFF RAMP WILL LEAD YOU ONTO ALBERTONI ST. MAKE A RIGHT ONTO AVALON BLVD AND WE ARE LOCATED ON THE RIGHT HANDSIDE (SAME PARKING LOT AS CARL'S JR).

FROM CA-91 W TAKE THE AVALON EXIT. MAKE A LEFT ONTO AVALON BLVD. MAKE A U-TURN ON AVALON BLVD AND ALBERTONI ST. WE ARE LOCATED ON THE RIGHT-HAND SIDE. (SAME PARKING LOT AS CARL'S JR).

EL MONTE - SANTA FE SPRINGS

10330 PIONEER BOULEVARD, SUITE 285
SANTA FE SPRINGS, CA 90670
(562) 325-8113

FROM THE I-5 NORTH TAKE NORWALK BLVD EXIT #121, TURN RIGHT ONTO NORWALK BLVD. TURN LEFT ONTO IMPERIAL HWY/CA-90. TURN RIGHT ONTO PIONEER BLVD, TESTING CENTER WILL BE ON YOUR RIGHT.

FRESNO

351 E. BARSTOW, SUITE 101
FRESNO, CA 93710
(559) 538-3975

FROM CA-41 S, TAKE THE BULLARD AVE EXIT. TURN LEFT ONTO E BULLARD AVE. TURN RIGHT ONTO N FRESNO ST. PASS THROUGH THE INTERSECTION OF FRESNO AND BASTOW AVE. TAKE THE FIRST DRIVEWAY ON THE RIGHT-HAND SIDE.

FROM CA-41 N, TAKE THE SHAW AVE EXIT TOWARD CLOVIS. TURN RIGHT ONTO E SHAW AVE. TURN LEFT ONTO N FRESNO ST. TURN LEFT INTO THE LAST DRIVEWAY BEFORE BARSTOW AVE. TESTING CENTER IS IN THE OFFICE COMPLEX ON THE SW CORNER OF BARSTOW AND FRESNO ST.

HAYWARD

24301 SOUTHLAND DRIVE, SUITE B-1
HAYWARD, CA 94545
(510) 901-7992

FROM I-880 N TOWARD OAKLAND, TAKE THE WINTON AVENUE EXIT. MERGE ONTO W WINTON AVE TOWARD HEALD COLLEGE. TURN LEFT ONTO SOUTHLAND DR.

FROM I-880 S TOWARD SAN JOSE/SAN MATEO BR, TAKE THE WINTON AVE WEST EXIT TOWARD HEALD COLLEGE. MERGE ONTO W WINTON AVE. TURN LEFT ONTO SOUTHLAND DR.

REDDING

2861 CHURN CREEK, UNIT C
REDDING, CA 96002
(530) 221-0945

FROM I-5 S, TAKE THE CYPRESS AVENUE EXIT (677). TURN RIGHT ONTO E. CYPRESS AVE. TURN RIGHT ON CHURN CREEK RD.

FROM I-5 N TOWARDS SACRAMENTO, TAKE THE CYPRESS AVE EXIT (677). TURN LEFT ONTO E. CYPRESS AVE. TURN RIGHT ONTO CHURN CREEK RD.

FROM 299 E TOWARDS REDDING, START GOING WEST ON CA-299. MERGE ONTO I-5 S RAMP ON THE LEFT TOWARDS SACRAMENTO. TAKE THE CYPRESS AVE EXIT (677). TURN LEFT ONTO E. CYPRESS AVE. TURN RIGHT ONTO CHURN CREEK RD.

FROM 299 W TOWARDS REDDING. START GOING EAST ON CA-299 TOWARDS WEAVERVILLE/REDDING. FROM 299 EAST TURN RIGHT ONTO CA-273/CA-299 E/MARKET STREET. TURN LEFT ONTO CA-299-E. MERGE ONTO I-5 S VIA EXIT 2A TOWARDS RED BLUFF/SACRAMENTO. TAKE THE CYPRESS AVE EXIT (677). TURN LEFT ONTO E. CYPRESS AVE. TURN RIGHT ONTO CHURN CREEK RD.

RIVERSIDE

7888 MISSION GROVE PARKWAY S., SUITE 130
RIVERSIDE, CA 92508
951-565-8037

FROM THE CA-91W TOWARD RIVERSIDE/BEACH CITIES, TAKE THE CENTRAL AVENUE EXIT TOWARD MAGNOLIA CENTER. TURN LEFT ONTO CENTRAL AVE. CENTRAL AVE BECOMES ALESSANDRO BLVD. VEER TO THE RIGHT, THEN STAY STRAIGHT TO GO ONTO TRAUTWEIN RD (YOU WILL PASS COMMUNICATIONS CENTER DR). TURN LEFT ONTO MISSION GROVE PKY W.

FROM THE HIGH DESERT/SAN BERNARDINO AREA 215 S, WHERE THE 60 FWY, 91 FWY AND THE 215 FWY SPLIT, TAKE 215S (SIGNS FOR THE 60 EAST INDI). TAKE EXIT 27C FOR ALESSANDRO BLVD, TURN RIGHT ONTO E ALESSANDRO BLVD, TURN LEFT ONTO MISSION GROVE PKWY S.

SACRAMENTO

8950 CAL CENTER DR, SUITE 158
SACRAMENTO, CA 95826
916-476-5926

FROM US-50 E: USE THE RIGHT TWO LANES TO TAKE EXIT 11 FOR WATT AVE. USE THE RIGHT 2 LANES TO TURN RIGHT ONTO WATT AVE. USE THE LEFT LANE TO TURN LEFT AT THE FIRST CROSS STREET ONTO FOLSOM BLVD. USE THE LEFT TWO LANES TO TURN LEFT ONTO MANLOVE RD. TURN LEFT ONTO CAL CENTER DR. BUILDING 8950 WILL BE ON THE LEFT.

FROM US-50 W: USE THE RIGHT TWO LANES TO TAKE EXIT 11 FOR WATT AVE. USE THE LEFT 2 LANES TO TURN LEFT ONTO WATT AVE. USE THE LEFT LANE TO TURN LEFT AT THE FIRST CROSS STREET ONTO FOLSOM BLVD. USE THE LEFT TWO LANES TO TURN LEFT ONTO MANLOVE RD. TURN LEFT ONTO CAL CENTER DR. BUILDING 8950 WILL BE ON THE LEFT.

SAN DIEGO

5440 MOREHOUSE DRIVE, SUITE 2300
SAN DIEGO, CA 92121
(858) 550-5940

FROM I-805 S, TAKE THE SORRENTO VALLEY RD/MIRA MESA BLVD EXIT. TURN LEFT ONTO MIRA MESA BLVD, TURN LEFT ONTO SCRANTON ROAD. TURN RIGHT ONTO MOREHOUSE DRIVE.

FROM I-805 N TOWARD LOS ANGELES, TAKE THE MIRA MESA BLVD/VISTA SORRENTO PKWY EXIT. TURN RIGHT ONTO MIRA MESA BLVD. TURN LEFT ONTO SCRANTON RD. TURN RIGHT ONTO MOREHOUSE DR.

ADDITIONAL PARKING CAN BE FOUND (on top of the AT&T building) BY CONTINUING ON MOREHOUSE PAST OUR BUILDING AND TURNING LEFT AT THE NEXT DRIVEWAY UP THE HILL

SAN FRANCISCO

150 EXECUTIVE PARK BLVD., STE 2400
SAN FRANCISCO, CA 94134
(415) 844-0008

I-80 W BECOMES US-101 S. TAKE EXIT 429 A TOWARD MONSTER PARK/TUNNEL AVE. TAKE THE RAMP TOWARD 3COM PARK. TURN RIGHT ONTO ALANNA RD. TURN LEFT ONTO EXECUTIVE PARK BLVD.

SANTA CLARA

2936 SCOTT BLVD
SANTA CLARA, CA 950547
(408) 844-0008

FROM US-101 N, TAKE THE SAN TOMAS EXPWY/MONTAGUE EXPWY EXIT- EXIT 392. TAKE THE SAN TOMAS EXPWY RAMP. MERGE ONTO SAN TOMAS EXPY/CR-G4. TURN LEFT ONTO SCOTT BLVD.

FROM I-880 S TOWARD SAN JOSE, TAKE THE MONTAGUE EXPWY EXIT (7). TAKE THE MONTAGUE EXPWY WEST RAMP. MERGE ONTO MONTAGUE EXPY/CR-G4 E. TURN LEFT ONTO E TRIMBLE RD. E TRIMBLE RD BECOMES DE LA CRUZ BLVD. TURN SLIGHT RIGHT ONTO CENTRAL EXPY/CR-G6 W. TURN SLIGHT RIGHT ONTO SCOTT BLVD.



SANTA ROSA

160 WIKIUP DRIVE, SUITE 105
SANTA ROSA, CA 95403
(707) 791-3113

FROM US-101 N, TAKE MARK WEST SPRINGS/RIVER ROAD EXIT. TURN RIGHT ON MARK WEST SPRINGS. TURN LEFT AT OLD REDWOOD HIGHWAY. TURN RIGHT ON WIKIUP DRIVE. FIRST DRIVEWAY ON RIGHT.

FROM US-101 S, TAKE MARK WEST SPRINGS/RIVER ROAD EXIT. TURN LEFT ON MARK WEST SPRINGS. TURN LEFT AT OLD REDWOOD HIGHWAY. TURN RIGHT ON WIKIUP DRIVE. FIRST DRIVEWAY ON RIGHT.

VENTURA

4245 MARKET ST, SUITE 208
VENTURA, CA 93003
(805) 650-5220

FROM US-101N, TAKE THE TELEPHONE ROAD EXIT 65. TURN LEFT ONTO TELEPHONE ROAD. TURN RIGHT ONTO MARKET STREET.

VISALIA

3400 W MINERAL KING AVE, SUITE D--
VISALIA, CA 93291
(559) 627-6700

FROM CA-99N, MERGE ONTO CA-198E VIA EXIT 96 TOWARD VISALIA/SEQUOIA NAT'L PARK. TAKE THE EXIT TOWARD DEMAREE STREET. MERGE ONTO W NOBLE AVENUE. TURN LEFT ONTO S COUNTY CENTER DRIVE. TAKE THE 1ST LEFT ONTO W MINERAL KING AVENUE.

WALNUT CREEK

175 LENNON LANE, SUITE 203
WALNUT CREEK, CA 94598
(925) 906-9165

FROM I-5N, KEEP LEFT TO TAKE I-580W TOWARD TRACY/SAN FRANCISCO. MERGE ONTO I-680N VIA EXIT 44B TOWARD SACRAMENTO/WALNUT CREEK/CONCORD. TAKE THE YGNACIO VALLEY ROAD EXIT AND TURN RIGHT. TURN LEFT ONTO LENNON LANE.

**OUT-OF-STATE EXAMINATION SITE
LOCATIONS**

The following out-of state sites will also offer this examination.

ALBUQUERQUE

2820 BROADBENT PARKWAY
SUITE E & F
ALBUQUERQUE, NM 87107

FROM I-40 W TAKE EXIT 159D, FOLLOW FRONTAGE RD. N TO MENAUL BLVD NE, MAKE A LEFT ONTO MENAUL BLVD NE, MAKE A RIGHT ONTO BROADBENT PKWY NE. BUILDING WILL BE ON THE RIGHT.

ATLANTA (MARIETTA)

2100 ROSWELL ROAD NE, SUITE 2128
MARIETTA, CA 30062

FROM I-75 NORTHBOUND, TAKE EXIT #263 - THE 120 LOOP, EAST TOWARD ROSWELL. DRIVE APPROXIMATELY 1.5 MILES (PAST POWERS FERRY AND LOWER ROSWELL ROADS) AND EXIT RIGHT TOWARD ROSWELL. MAKE A RIGHT AT THE LIGHT OFF OF THE EXIT AND ONTO ROSWELL ROAD. PAVILIONS AT EAST LAKE SHOPPING CENTER IS 1/2 MILE ON RIGHT. THE SITE IS LOCATED IN SUITE 2128 IN THE SAME SHOPPING CENTER AS KROGERS.

FROM I-75 SOUTHBOUND, TAKE EXIT#265 - GA 120 LOOP/EAST. TURN LEFT ONTO NORTH MARIETTA PKWY. AFTER 1.4 MILES, TAKE THE RIGHT-SIDE OFF RAMP TO GA-3/ROSWELL/MARIETTA. TURN LEFT ONTO GA-120 EAST/ROSWELL RD. GO .3MILE TO PAVILIONS AT EAST LAKE SHOPPING CENTER. TURN RIGHT INTO SHOPPING CENTER. THE SITE IS LOCATED IN SUITE 2128 IN THE SAME SHOPPING CENTER AS KROGERS.

BOSTON (CHARLESTOWN)

WASHINGTON CROSSING
56 ROLAND ST, SUITE 305
CHARLESTOWN, MA 02129

FROM THE NORTH: TAKE I-93 SOUTH. EXIT 28 -BOSTON/SULLIVAN SQ./CHARLESTOWN. MERGE INTO MYSTIC AVE. TAKE I-93S RAMP TO BOSTON/SULLIVAN SQ./CHARLESTOWN (TAKE RAMP DO NOT GET ON HIGHWAY). MAKE SLIGHT LEFT TURN ON TO MAFFA WAY. MAKE SLIGHT RIGHT TURN ON TO CAMBRIDGE STREET. AT FIRST TRAFFIC LIGHT, MAKE LEFT ON TO CARTER STREET. TURN RIGHT ON TO ROLAND STREET. END AT 56 ROLAND. ENTER THROUGH NORTH LOBBY. DO NOT PARK IN THE BUILDING'S PARKING LOT.

FROM THE SOUTH: TAKE I-93 NORTH. EXIT 28 - RT 99/SULLIVAN SQ./SOMERVILLE. MAKE LEFT ON TO CAMBRIDGE ST. AT FIRST TRAFFIC LIGHT, MAKE LEFT ON TO CARTER STREET. TURN RIGHT ON TO ROLAND STREET. END AT 56 ROLAND STREET (BUILDING ON LEFT, PARKING LOT ON RIGHT). ENTER THROUGH NORTH LOBBY. DO NOT PARK IN THE BUILDING'S PARKING LOT.

CHARLOTTE

TYVOLA EXECUTIVE PARK 1
5701 WESTPARK DR, #202
CHARLOTTE, NC 28217

FROM I-77S TOWARDS COLUMBIA, EXIT TYVOLA ROAD (EXIT #5). TURN LEFT AT TYVOLA ROAD. MAKE A RIGHT AT WESTPARK DR.

FROM I-77N, EXIT TYVOLA ROAD (EXIT #5). BEAR RIGHT AT TYVOLA ROAD. TURN RIGHT AT WESTPARK DR.

CHERRY HILL

950 N. KINGS HWY, SUITE 301
CHERRY HILL, NJ 08034

FROM THE NEW JERSEY TPKE S, TAKE EXIT #4/PHILADELPHIA/CAMDEN ONTO RT-73 N TOWARD CAMDEN/PHILADELPHIA. TAKE RAMP ONTO I-295 S TOWARD DEL MEM BR. TAKE EXIT #34B/CHERRY HILL/CAMDEN ONTO MARLTON PIKE (RT-70 W). TURN RIGHT ON KINGS HWY N (RT-41). NOTE BUILDING 950 IS BEHIND BUILDINGS #900 AND #1030.

CHICAGO

332 S. MICHIGAN AVENUE
SUITE 410
CHICAGO, IL 60604

TAKE US-41S WHICH BECOMES I-94E. TAKE THE W JACKSON BLVD EXIT (51F). TURN LEFT ON W JACKSON BLVD. TURN RIGHT ON S MICHIGAN AVE.

CRANBERRY TOWNSHIP

CRANBERRY CORPORATE BUSINESS CENTER
213 EXECUTIVE DR., SUITE 150
CRANBERRY TOWNSHIP, PA 16066

FROM I-79 EXIT CRANBERRY-MARS ROUTE 228, GO WEST. CROSS OVER ROUTE 19 ONTO FREEDOM ROAD. GO THREE TRAFFIC LIGHTS THEN TURN RIGHT ONTO EXECUTIVE DRIVE. BUILDING IS DIRECTLY ACROSS FROM HAMPTON INN.

DALLAS

1701 N COLLINS BLVD, SUITE 130
RICHARDSON, TX 75080

FROM US-75 NORTH TAKE EXIT 26 ONTO N. CENTRAL EXPRESSWAY TOWARD COLLINS BLVD./CAMPBELL RD. TURN LEFT ONTO CAMPBELL RD. TURN LEFT ON COLLINS BLVD. BUILDING IS ON RIGHT.

HOUSTON (NORTHWEST)

9800 NORTHWEST FREEWAY
SUITE 200
HOUSTON, TX 77092

FROM HWY 290 DRIVING SOUTHEAST, MERGE ONTO LOOP 610 NORTH. EXIT AT T.C.JESTER AND THEN U-TURN UNDER LOOP 610. STAY ON THE FEEDER ROAD, SHERATON HOTEL IS ON THE RIGHT AS THE ROAD CURVES RIGHT. TURN INTO THE PARKING LOT IMMEDIATELY AFTER THE



SHERATON HOTEL AND BEFORE THE OFFICE BUILDING. CENTER IS ON THE 2ND FLOOR.

LAS VEGAS

3210 E TROPICANA AVENUE
LAS VEGAS, NEVADA 89121

FROM I-15 - EXIT EAST ON TROPICANA, TRAVEL APPROXIMATELY 4 MILES, TURN LEFT ON MOJAVE, TURN RIGHT INTO THE PARKING LOT.
FROM I-95 - EXIT WEST ON TROPICANA, TRAVEL APPROXIMATELY 1 MILE, TURN RIGHT ON MOJAVE, TURN RIGHT INTO THE PARKING LOT.

MILFORD

500 BIC DRIVE
SUITE 101

MILFORD, CT 06461

FROM HIGHWAY I-95 EXIT 35. GO TOWARD BIC DRIVE. GO .5 MILES TO 500 BIC DRIVE WHICH IS AT GATE 1 OF THE FORMER BIC COMPLEX. GO TO THE REAR OF THE LOT AND PARK. WALK DOWN THE HILL IN FRONT OF THE BUILDING AND ENTER THE FRONT DOOR. SIGNS WILL DIRECT YOU TO SUITE 101 (PSI).

NASHVILLE

THE OAKS

1100 KERMIT DRIVE, SUITE 103
NASHVILLE, TN 37217

FROM I-40 EAST: TAKE EXIT ONTO I-24 (EXIT 213-A). TAKE MURFREESBORO ROAD AT THE FIRST EXIT (EXIT 52). STAY IN THE RIGHT LANE ON THE RAMP, AS THE EXIT APPEARS WHILE YOU ARE STILL IN THE CURVE. ON MURFREESBORO, STAY IN THE LEFT LANE. YOU WILL PASS DAYS INN AND SUPER GIGANTE GROCERY ON YOUR RIGHT. TURN LEFT ONTO KERMIT DRIVE WHEN THERE IS A MCDONALDS ON YOUR RIGHT. PSI IS IN THE FIRST BUILDING ON YOUR LEFT.

FROM I-40 WEST: TAKE EXIT ONTO BRILEY PARKWAY, TURN LEFT ONTO BRILEY PWY. EXIT ONTO MURFREESBORO RD. STAY IN THE RIGHT LANE. TURN RIGHT ONTO KERMIT DRIVE. PSI IS IN THE FIRST BUILDING ON YOUR LEFT.

NORTH OREM (PROVO)

581 WEST 1600 NORTH, SUITE C
NORTH OREM, UT 84057

FROM US-89, TURN RIGHT ONTO W CENTER ST/UT-114. MERGE ONTO I-15 N VIA THE RAMP ON THE LEFT TOWARD SALT LAKE. TAKE THE 1600 NORTH EXIT 273. TURN EAST ONTO WEST 1600 NORTH. GO ONE MILE EAST.

NORTH SALT LAKE CITY

25 NORTH 400 WEST, SUITE 7
NORTH SALT LAKE CITY, UT 84054

(THE CITY OF NORTH SALT LAKE NOT SALT LAKE CITY PROPER. THE PSI TEST SITE IS IN DAVIS COUNTY JUST NORTH OF THE FLYING J REFINERY.)

FROM SALT LAKE CITY AND THE SOUTH.

MERGE ON TO I-15N. TAKE EXIT 312 AND MERGE ON TO US89 NORTH FOR ABOUT 1.8 MILES. TURN LEFT ONTO E CENTER ST AND GO WEST FOR ABOUT .6 MILES. TURN RIGHT ON TO 400 W.

FROM THE NORTH

MERGE ONTO I-15 S SALT LAKE. TAKE THE CENTER ST., EXIT 314. TURN RIGHT ONTO W CENTER ST. TURN RIGHT ONTO 400 W.

FROM I-80 EAST MERGE TO I-215 NORTH. TAKE THE REDWOOD RD/UT-68 EXIT 28 AND TURN RIGHT ONTO CENTER STREET.

PHOENIX

5727 N 7TH ST., SUITE 301
PHOENIX, AZ 85014

FROM I-17 SOUTH EXIT TO BETHANY HOME ROAD. GO LEFT (EAST) ON BETHANY HOME. TURN RIGHT (SOUTH) ON 7TH STREET. THE PSI SITE IS ON THE EAST SIDE OF THE STREET JUST BEFORE MISSOURI. IT IS A 4 STORY GLASS BUILDING.

QUEENS

THE SHOPS AT ATLAS PARK
71-19 80TH STREET, SUITE 8307
GLENDALE (QUEENS), NY 11385

FROM I-678 S, TAKE THE J ROBINSON PKWY EXIT- EXIT 7. TAKE THE FOREST PARK DR EXIT- EXIT 4- TOWARD MYRTLE AVE / WOODHAVEN BLVD. TAKE THE RAMP TOWARD MYRTLE AVE / WOODHAVEN BLVD. TURN SLIGHT RIGHT ONTO FOREST PARK DR. TURN RIGHT ONTO MYRTLE AVE. TURN LEFT ONTO 80TH ST. GO TO 2ND LIGHT PAST MYRTLE AVE OVER SMALL OVERPASS MAKE A RIGHT INTO ATLAS PARK. MAKE A RIGHT AT STOP SIGN TO GET INTO PARKING LOT. ONCE PARKED, GO TO TOP FLOOR OF PARKING LOT, TURN RIGHT AND WALK UNTIL YOU SEE "MARKET PLAZA". TAKE ELEVATOR TO THE 3RD FLOOR. OFFICES ARE LOCATED IN THE RED BRICK BUILDING.

RICHMOND

MOOREFIELD VI BUILDING
620 MOOREFIELD PARK DRIVE, SUITE 205
RICHMOND, VA 23236

FROM I-64E, TAKE THE PARHAM RD EXIT AND TURN RIGHT. N PARHAM RD/VA-73 S BECOMES VA-150 S/CHIPPENHAM PKWY. MERGE ONTO VA-76 S/POWHITE PKWY. MERGE ONTO MIDLOTHIAN TURNPIKE WEST. TURN LEFT ON MOOREFIELD PARK DR.

SOUTHFIELD (DETROIT AREA)

2640 LAHSER ROAD, SUITE 150
SOUTHFIELD, MI 48033

FROM I-96 E MERGE ONTO I-696 E. THEN MERGE ONTO MI-10 S. TAKE THE LAHSER ROAD EXIT. KEEP LEFT AT THE FORK IN THE RAMP. TURN LEFT ONTO NORTHWESTERN HWY. TURN RIGHT ONTO LAHSER ROAD. YOU MAY ACCESS THE BUILDING FROM THE BACK USING THE NW DOOR.

WEST DES MOINES

1001 OFFICE PARK ROAD, SUITE 315
WEST DES MOINES, IA 50265

FROM I-235, EXIT 8TH ST/73RD ST AND PROCEED SOUTH. TURN RIGHT ON OFFICE PARK ROAD. TURN RIGHT INTO THE DRIVEWAY.

WEST HARTFORD

1245 FARMINGTON AVENUE, SUITE 203
WEST HARTFORD CT.

FROM I-84 WEST, TAKE EXIT 40 TOWARD CT-71/NEW BRITAIN AVE/CORBINS CORNER. TURN RIGHT ONTO RIDGEWOOD RD. TURN LEFT ONTO WOOD PONT RD. TURN LEFT ONTO TUNXIS RD. TURN RIGHT ONTO BROOKMOOR RD. TURN RIGHT ONTO BUENA VISTA RD. TURN LEFT ONTO EVERETT AVE. TURN RIGHT ONTO FARMINGTON AVE. DESTINATION IS ON THE RIGHT.

WILSONVILLE

25195 SW PARKWAY AVENUE, SUITE 105
WILSONVILLE, OR 97070

GOING SOUTH: OFF 15, TAKE EXIT 286 (ELLINGENS/BOONES FERRY RD). TURN LEFT AND CROSS BACK OVER THE FREEWAY. TURN LEFT AT 2ND SIGNAL LIGHT (PARKWAY AVE.) TURN INTO PARKWAY PLAZA PARKING LOT (ACROSS THE STREET FROM SHRINER'S). WE ARE LOCATED IN THE MAIN ENTRANCE FIRST DOOR ON THE RIGHT.

WOODBURY

6053 HUDSON RD, SUITE 210
WOODBURY, MN 55125

FROM I-94 GO SOUTH ON CENTURY TO THE FIRST LEFT (WHICH IS THE FRONTAGE ROAD ENTRANCE TO THE COUNTRY INN). ENTER THE OFFICE COMPLEX THROUGH THE SINCLAIR GAS STATION AND ALONG BACK OF THE INN. 6053 IS THE BUILDING DIRECTLY AHEAD. THE ENTRANCE ON THAT (WEST) SIDE IS ACTUALLY ON THE 2ND FLOOR. SUITE 210 IS DOWN THE CORRIDOR TO THE RIGHT. PLEASE USE THE WEST ENTRANCE ON SATURDAYS.



Professional Fiduciaries Bureau
P.O. Box 989005
West Sacramento, CA 95798-9005
(916) 574-7340
www.fiduciary.ca.gov



STATE OF CALIFORNIA NOTICE OF ELIGIBILITY

You are eligible to participate in the examination for licensure as a California Professional Fiduciary. Your address label contains important date information. In the upper left corner of the address label (above your name) is the date you were determined eligible by the Bureau to take the examination; following that is the date by which you must take your examination. You must pass the examination by the date specified on the label or you will need to reapply to the Bureau.

This bulletin is designed to provide you with information regarding examination procedures. To schedule your examination, please refer to the instructions in this bulletin.
