DEPARTMENT OF CONSUMER AFFAIRS
PFB
PROFESSIONAL FIDUCIARIES BUREAU

BUSINESS AND CONSUMER SERVICES AGENCY • GAVIN NEWSOM, GOVERNOR
DEPARTMENT OF CONSUMER AFFAIRS • PROFESSIONAL FIDUCIARIES BUREAU
1625 North Market Blvd., Suite S-209, Sacramento, CA 95834
P (916) 574-7340 | F (916) 574-8645 | www.fiduciary.ca.gov

Professional Fiduciaries Bureau
Advisory Committee Meeting

NOTICE OF IN PERSON AND TELECONFERENCE MEETING

Meeting Date and Time
Wednesday, December 9, 2026, at 10:00 a.m.

Meeting Location
This meeting will be held by teleconference via Webex Events, webcast, and in person at the following location:

Department of Consumer Affairs
1625 North Market Blvd.,
First Floor Hearing Room, Suite S-102
Sacramento, CA 95834

Advisory Committee Members
Bertha Sanchez Hayden, Chair (attending remotely)
Elizabeth Ichikawa, Vice Chair (attending remotely)
Joyce Anthony (attending remotely)
James Moore (attending remotely)
Linda Ng (attending remotely)
Alfred Torregano (attending remotely)

Members of the public are not required to identify themselves. When signing into the Webex platform, attendees may provide a unique identifier, such as their initials or another alternative, and provide a fictitious email address in the following sample format: XXXXX@mailinator.com.

Click here to join the meeting, and enter your first name, last name, email, and the event password listed below:

If joining using the link above
Webinar number: 2486 742 8510
Webinar password: PFB129

If joining by phone
+1-415-655-0001 US Toll
Access code: 2486 742 8510
Passcode: 732129

Instructions to connect to the meeting can be found above and at the end of this agenda. To ensure any public comments are received, we encourage submitting written comments by December 7, 2026, to fiduciary@dca.ca.gov, in case of unforeseen technical issues during the meeting.

Members of the public may also view a livestream of this meeting at https://thedcapage.blog/webcasts/. Using the livestream link will allow only for observation with closed captioning. Livestream availability cannot be guaranteed due to resource limitations or technical difficulties. The meeting will not be cancelled if livestream becomes unavailable.

This meeting is available to the public in person, via Webex and webcast. The meeting is accessible to the physically disabled. A person who would like more information about the meeting, or needs disability-related accommodations or modifications to participate in the meeting, may ask questions about the meeting or make a disability-related accommodation request by contacting Angela Cuadra by phone at (916) 574-7498, TDD Line at (916) 326-2297, or by email to fiduciary@dca.ca.gov. Written requests can be sent to the Professional Fiduciaries Bureau, 1625 North Market Blvd., Suite S-209, Sacramento, CA 95834. Providing your request at least five (5) business days prior to the meeting will help ensure availability of the requested accommodations.

AGENDA

Discussion and action may be taken on any agenda item.

1) Call to Order

2) Roll Call and Establishment of Quorum

3) Advisory Committee Members, Bureau Chief, Staff, and Legal Counsel Introductions

4) Public Comment on Items Not on the Agenda

   Please note: The Advisory Committee may not discuss or take action on this agenda item except to decide whether to place the matter on the agenda of a future meeting (Government Code sections 11125 and 11125.7(a)).

5) Reading of the Professional Fiduciaries Bureau Mission Statement

6) Discussion and Possible Action to Approve the Advisory Committee Meeting Minutes from September 9, 2026

7) Department of Consumer Affairs (DCA) Update Which May Include Updates on DCA's Administrative Services, Human Resources, Enforcement, Information Technology, Communications and Outreach, and Legislative, Regulatory, or Policy Matters

8) Budget Report
   - Budget Overview and Update

9) PFB Strategic Plan Introductory Presentation – DCA SOLID Planning Unit

10) Bureau Updates – Nicole Dragoo, Bureau Chief
   - Application, Licensing, and Enforcement Statistics
   - AB 2796 Clarification
   - Staffing Update
   - Update on 2026 Sunset Review Report

11) Future Agenda Items

12) Future Meeting Dates
   - Wednesday, March 10, 2027
   - Wednesday, June 9, 2027
   - Wednesday, September 8, 2027
   - Wednesday, December 8, 2027

13) Adjournment

This agenda is available on the Professional Fiduciaries Bureau's website at www.fiduciary.ca.gov. Action may be taken on any item on the agenda. The time and order of agenda items are subject to change at the discretion of the Chair and may be taken out of order. In accordance with the Bagley-Keene Open Meeting Act, all meetings of the Bureau are open to the public.

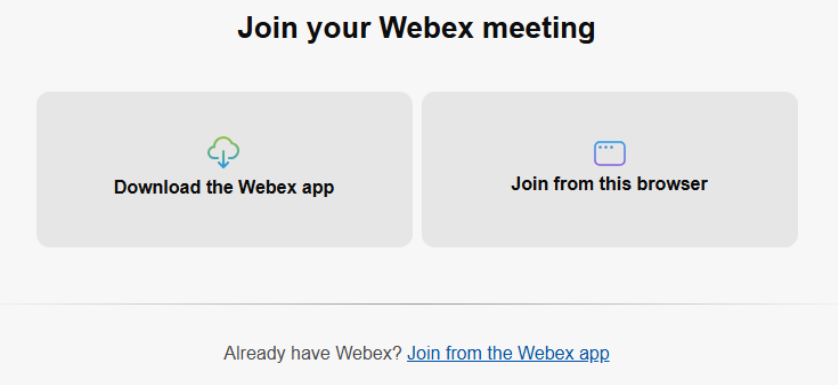
The Bureau welcomes and encourages public participation at its Advisory Committee meetings. Government Code section 11125.7 provides the opportunity for the public to address each agenda item during discussion or consideration by the Committee prior to the Committee taking any action on said item. Members of the public will be provided appropriate opportunities to comment on any issue before the Committee, but the Committee Chair may, at their discretion, apportion two minutes per speaker for those who wish to speak. Individuals may appear before the Committee to discuss items not on the agenda; however, the Committee can neither discuss nor take official action on these items at the time of the same meeting (Government Code sections 11125 and 11125.7(a)).

Recommended: Join using the meeting link.

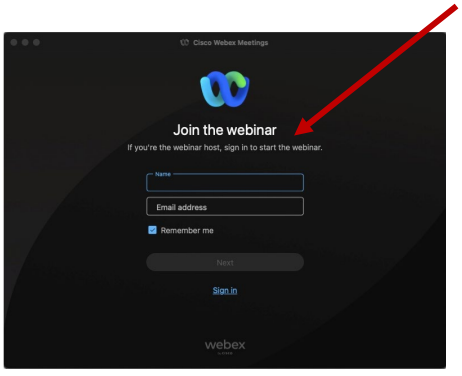
1. Click on the meeting link. This can be found in the meeting notice you received and is on the meeting agenda.

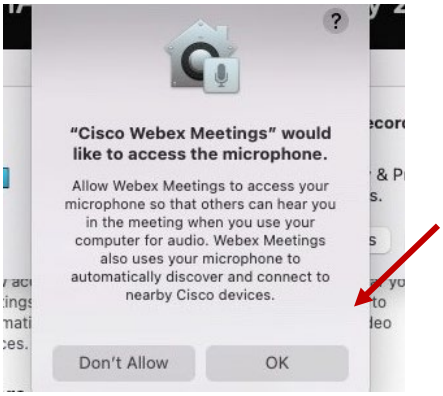
2. If you already have Webex on your device, click the bottom instruction, "Join from the Webex app."

   If you have **not** previously used Webex on your device, your web browser will offer "Download the Webex app." Follow the download link and follow the instructions to install Webex.



3. Enter your name and email address*. Click "Next."
   Accept any request for permission to use your microphone and/or camera.

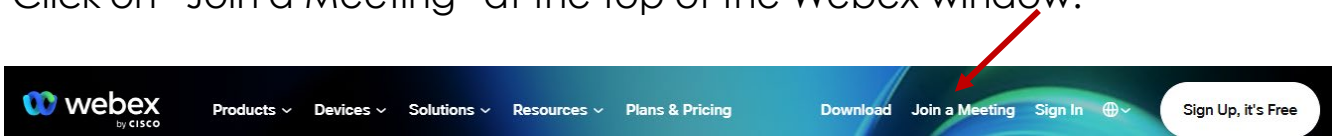




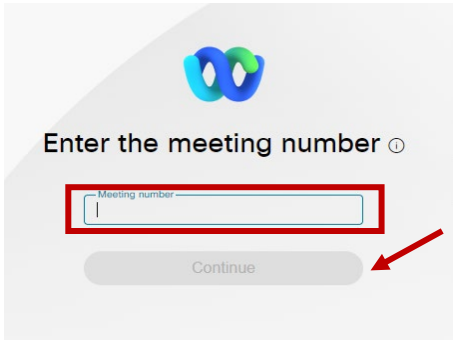
*Members of the public are not obligated to provide their name or personal information and may provide a unique identifier such as their initials or another alternative as well as a fictitious email address like in the following sample format: XXXXX@mailinator.com.

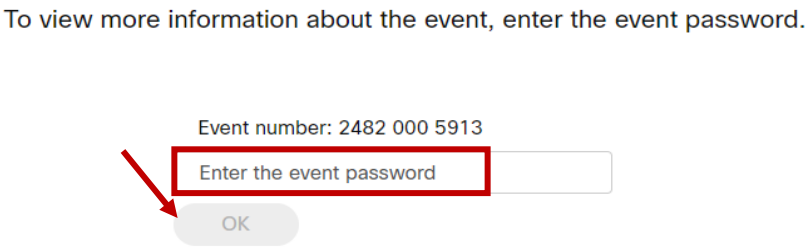
Alternative 1. Join from Webex.com

1 Click on "Join a Meeting" at the top of the Webex window.

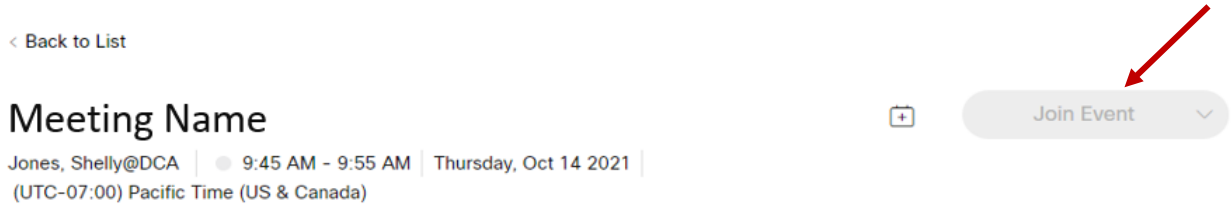


2 Enter the meeting/event number and click "Continue." Enter the event password and click "OK." This can be found in the meeting notice you received or on the meeting agenda.





3 The meeting information will be displayed. Click "Join Event."

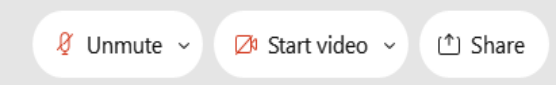


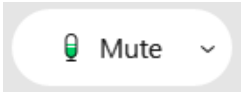
OR

Alternative 2. Connect via Telephone

You may also join the meeting by calling in using the phone number, access code, and passcode provided in the meeting notice or on the agenda.

Microphone control (mute/unmute button) is located at the bottom of your Webex window.





Green microphone = Unmuted: People in the meeting can hear you.



Red microphone = Muted: No one in the meeting can hear you.

Note: Only panelists can mute/unmute their own microphones. Attendees will remain muted unless the moderator invites them to unmute their microphone. Only panelists will be offered starting their video camera.

Attendees/Members of the Public

Joined via Meeting Link

The moderator will call you by name and indicate a request has been sent to unmute your microphone. Upon hearing this prompt:

Click the Unmute me button on the pop-up box that appears.



Joined via Telephone (Call-in User)

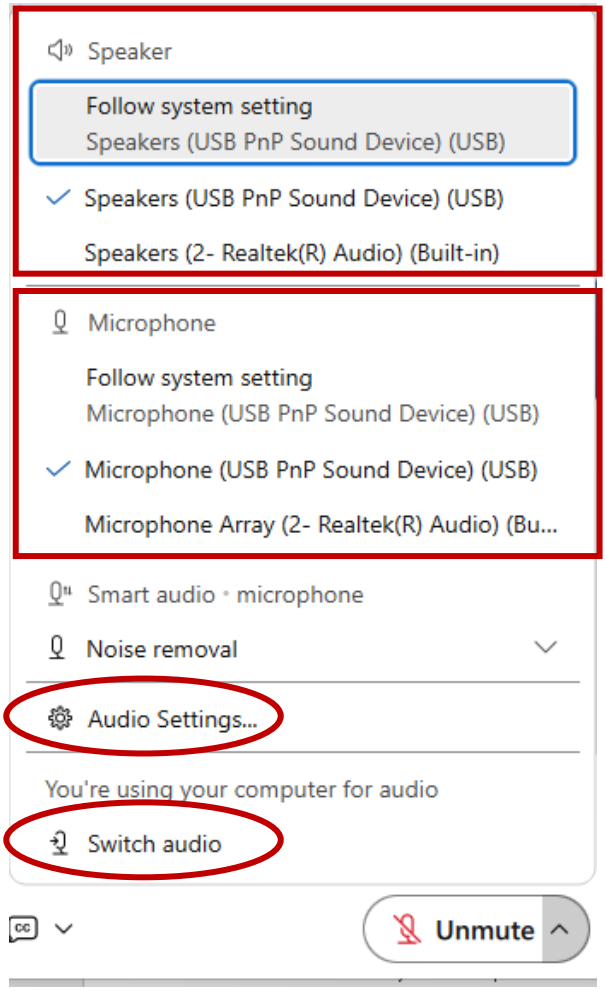
- When you are asked to unmute yourself, press *6.
- When you are finished speaking, press *6 to mute yourself again.

If you cannot hear or be heard

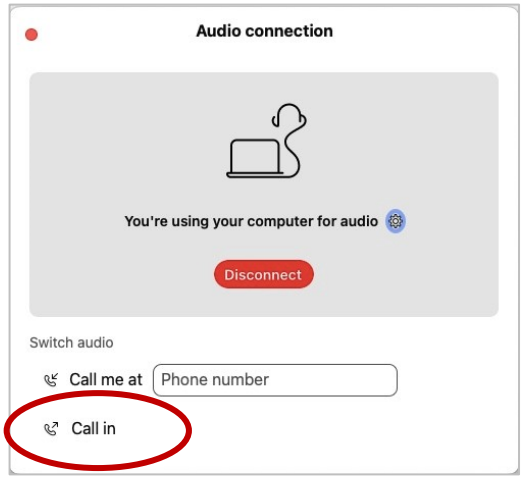
1. Click on the bottom facing arrow located on the Mute/Unmute button at the bottom of the Webex window.



2. From the drop-down menu, select different:
   A. Speaker options if **you can't hear** participants.
   B. Microphone options if **participants can't hear you**.
   C. Audio settings will offer testing of your devices, and let you choose a different device.



3. To link your phone to your Webex session, enabling your phone to become your microphone and speaker source:
   - Click on "Switch audio".
   - Select "Call in", which will show the phone number to call and the meeting login information.



Joined via Meeting Link

- Locate the hand icon at the bottom of the Webex window.
- Click the hand icon to raise your hand.
- Repeat this process to lower your hand.



The moderator will call you by name and indicate a request has been sent to unmute your microphone.

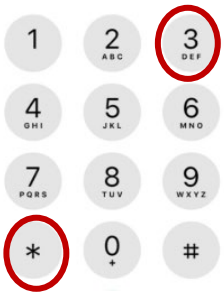
Upon hearing this prompt:

Click the Unmute me button on the pop-up box that appears.

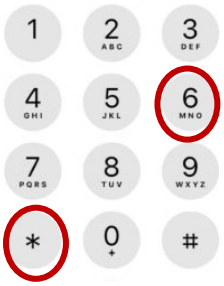


Joined via Telephone (Call-in User)

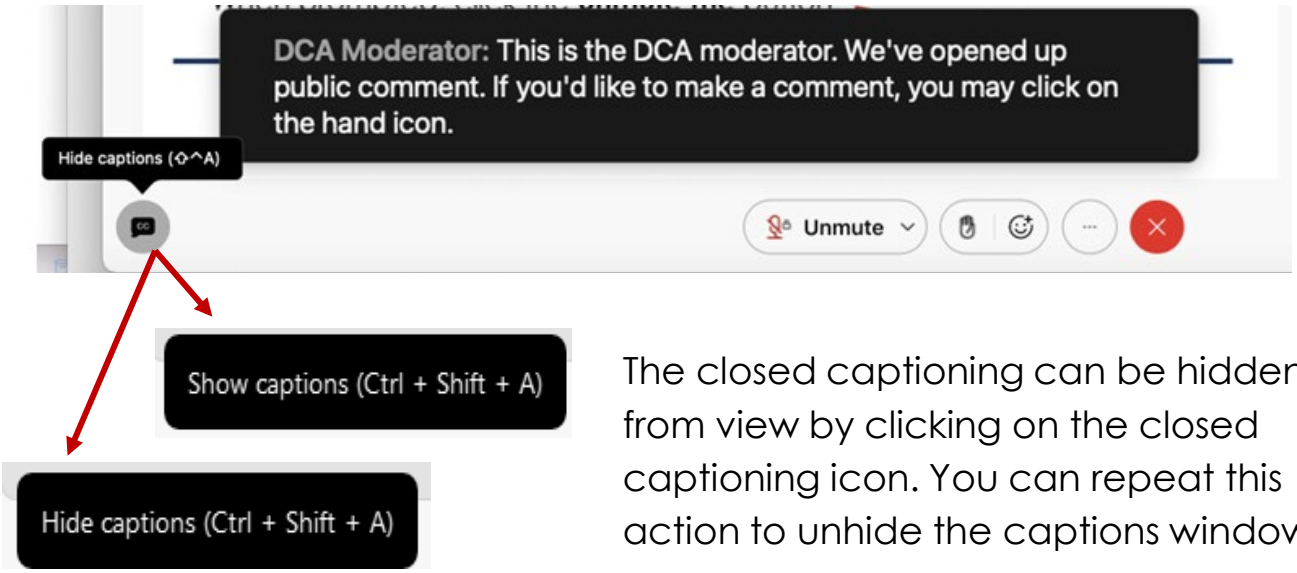
Press *3 to raise or lower your hand.



- When you are asked to unmute yourself, press *6.
- When you are finished speaking, press *6 to mute yourself again.



Webex provides real-time closed captioning displayed in a dialog box in your Webex window. The captioning box can be moved by clicking on the box and dragging it to another location on your screen.



The closed captioning can be hidden from view by clicking on the closed captioning icon. You can repeat this action to unhide the captions window.

You can view the closed captioning dialog box with a light or dark background or change the font size by clicking the 3 dots on the right side of the dialog box.

