

Professional Fiduciaries Bureau

1625 North Market Blvd., Suite S-209

Sacramento, CA 95834

Phone: (916) 574-7340 FAX (916) 574-8645

Website: www.fiduciary.ca.gov

COURT ACCESS TO INFORMATION ON LICENSED PROFESSIONAL FIDUCIARIES

Dear Court Representative:

To access the following information on Licensed Professional Fiduciaries please visit the Bureau's web site at www.fiduciary.ca.gov

- Licensee name and license number
- License issuance and expiration date
- Bankruptcy information
- Client assets and license discipline

Client assets will be available once reported to the Bureau on the annual reports as required by law (The law provides that a licensee file an [Initial Annual Statement](#) with the Bureau within 60 days of licensure and then an [Annual Statement](#) at least 60 days prior to license renewal each year). Any disciplinary action against a licensee by the Bureau will also be posted on the web site upon occurrence.

In addition, the Bureau is prepared to provide courts will **confidential information** on licensees as required in Business and Professions Code Section 6534 once the information is reported to the Bureau:

- Current conservatees or wards and the trusts or estates currently administered by licensee
- Business and residential addresses and telephone numbers of licensee
- Client names, and case numbers if applicable, for all conservatorships, guardianships, and trusts or estate administration cases on closed cases for licensee
- Removals, resignations, and settlements

To request confidential information on licensees, you must first obtain a private official account from the Bureau for security purposes. The private account is for your use only and is not to be shared. To request an account:

1. Complete the [COURT AUTHORIZATION REQUEST FORM](#) in its entirety. Provide official contact information only. ***No personal or private contact information will be accepted.***
2. Send a letter on official court or authorized agency stationary requesting an account.
3. Mail the completed form and letter to the Bureau:

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The Bureau is committed to protecting the consumers of our State and we look forward to working with you. Please contact the Bureau at (916) 574-7340 if you have any questions or concerns.

Sincerely,
Rebecca May
Chief, Professional Fiduciaries Bureau