

## FAQs

### Renewals

**Q: How can I find out if my license has been renewed?**

A: You can view the status of your license by using the [License Verification Tool](#).

**Q: How do I find out if the Bureau received my annual statement?**

A: [Annual statements](#) emailed to [PFBRenewals@dca.ca.gov](mailto:PFBRenewals@dca.ca.gov) will receive a confirmation of receipt by email. If you send your annual statement by fax, please turn on the confirmation of delivery to show proof of delivery. If you mail your annual statement, please utilize a mailing method that allows you to track and confirm delivery. The Bureau does not confirm the receipt of faxed or mailed annual statements.

**Q: How long does it take to renew my license?**

A: The processing time for renewals is 4-6 weeks from the date a completed renewal packet is received by the Bureau. A complete renewal packet includes a complete and accurate [annual statement](#), verification of completion of continuing education credits, and payment of the renewal fee.

**Q: I sent my annual statement less than 60 days before my license expired and now my license is about to expire. Can I request that my renewal be expedited?**

A: Renewals are processed in the order received, provided they are complete. Pursuant to [BPC Section 6562](#), [annual statements](#) are required to be submitted at least 60 days prior to the expiration of a license. [Annual statements](#) submitted less than 60 days before the license expiration date may result in your license expiring before the renewal can be processed.

**Q: Can I continue to practice if my license expires?**

A: Pursuant to [BPC Section 6531](#) a professional fiduciary shall not operate with an expired, suspended, retired, canceled, or revoked license.

**Q: How do I verify completion of CE units if I did not receive the renewal payment notice?**

A: A continuing education certification form is available on the Bureau's website under [Forms/Publications](#).

## **No Longer Actively Practicing as a Professional Fiduciary**

**Q: I no longer wish to practice as a professional fiduciary, and I do not want to apply for retired or inactive status. Am I required to notify the Bureau and submit any documents prior to stopping?**

A: Submit your [annual statement](#) at least 60 days prior to the expiration date of your license and include a note that you will not be renewing. Your license status will indicate “delinquent” on the Bureau’s license verification page.

**Q: I notified the Bureau that I will no longer be practicing. Why is my license in “delinquent” status?**

A: Your licensing record reflects the current status of your license. Your license will remain in a delinquent status for three years and will automatically cancel after three years of inactivity pursuant to [BPC section 6541.1](#). If you would like to apply for a retired or inactive license status, visit the Bureau’s [Licensee page](#) to determine if you qualify.

## **Continuing Education**

**Q: How do I meet the new cultural competency requirement?**

A: To meet the requirement, you can take: two hours of ethics; OR two hours of cultural competency; OR a combination of both ethics and cultural competency totaling two hours.

If you cannot locate a cultural competency course, you can still take two hours of ethics to meet the requirement. The new law simply provides an alternative to meet the existing requirement.

**Q: Where can I find courses to take to meet the required CE credits?**

A: Please review [CCR Article 3](#) for more information on continuing education requirements. You can find the [Approved Education Providers](#) list on the Bureau’s website.

## **New Licensees**

**Q: I was just issued a license, am I required to do any reporting after I obtain my license?**

A: Newly licensed professional fiduciaries are required to submit an [Initial Annual Statement](#) **within 60 days** of the issuance of a license. Initial annual statement can be emailed to [PFBRenewals@dca.ca.gov](mailto:PFBRenewals@dca.ca.gov), faxed to (916) 574-8645, or mailed to the Professional Fiduciaries Bureau, 1625 N. Market Blvd, Suite S-209, Sacramento, CA 95834.

**Q: This is my first renewal. How many CE units am I required to complete?**

A: You will need a total of 15 hours of continuing education from the date your license was issued to the expiration date.

## **Applicants**

**Q: Where can I find study materials for the exam?**

A: A link to the study materials can be found on the Bureau's website under the [Applicant](#) section.

**Q: How do I sign up for the licensing exam?**

A: To be eligible to sit for the professional fiduciary licensing exam, you will first need to mail a complete application with the application fee to the Professional Fiduciaries Bureau, 1625 N. Market Blvd, Suite S-209, Sacramento, CA 95834.

Upon approval of your application, the Bureau will provide you with information on how to register with the [Center for Guardianship Certification](#) (CGC). Once you have been approved by CGC, you will be provided with information on how to schedule the exam with PSI.

**Q: How long will it take to process my application?**

A: The processing time for applications is up to 90 days from the receipt of a completed application packet. If your application is deficient, you will be notified in writing of the deficiencies and what information is required to complete the application.

**Q: How will I find out if my application is approved or denied?**

A: You will be informed in writing, within 90 days of submitting a complete application packet, that your application has been approved or denied.

**Q: I submitted my application over 90 days ago. I have not received notice of approval or denial. What do I do?**

A: If you have not received approval from the Bureau to take the exam, and it has been more than 90 days since your application was submitted, please contact Angela Cuadra at [angela.cuadra@dca.ca.gov](mailto:angela.cuadra@dca.ca.gov) to obtain status of your application.

## **Other Licensing Questions**

**Q: I am an attorney licensed with the California State Bar. Do I need to complete pre-licensing education requirements to obtain a professional fiduciary license?**

A: Pursuant to [BPC 6533](#) pre-licensing education is a requirement for licensure. There are no exemptions granted under this statute.

**Q: I am a CPA licensed with the California Board of Accountancy. Am I required to hold professional fiduciary license to practice as a professional fiduciary?**

A: Pursuant to [BPC 6530](#), CPAs are exempt from licensure requirements only if acting within the scope of practice of a CPA under Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code.

**Q: I am an enrolled agent. Am I required to hold professional fiduciary license to practice as a professional fiduciary?**

A: Pursuant to [BPC 6530](#), enrolled agents practicing before the Internal Revenue Service are exempt from licensure requirements if acting within their scope of practice pursuant to Part 10 of Title 31 of the Code of Federal Regulations.