



**CALIFORNIA CORE COMPETENCIES**  
**Percentages on Exams**  
**March 2018**



What is a Core Competency?

CGC relies upon a written survey to identify topic areas, or competencies, that should be covered in the certification examination. The purpose of the survey is to describe the "job" of a guardian in sufficient detail to ensure that the examination content is job-related.

Guardians who work in the specific state or on a national level complete the surveys. They are asked to rank the topics that are grouped into seven "core competencies" and several sub-topics. Exam questions are coded to the appropriate competency sub-topic and assigned to the exams according to the priorities the survey participants determined. The examination is designed to allow applicants to demonstrate the different skill sets and knowledge guardians must be able to apply to adequately carry out their responsibilities.

**1. PROFESSIONAL PRACTICES – 17%**

**Knowledge and application fiduciary principles as they relate to the professional roles of the fiduciary (includes but not limited to):**

- |   |   |
|---|---|
| 1.1 CA Code of Ethics/Standards of Practice | 1.5 Conflict of Interest                |
| 1.4 Confidentiality                         | 1.7 Fiduciary practice management/fees  |
|   | 1.8 CA fiduciary licensing requirements |

**2. KNOWLEDGE OF CONSERVATEE - 14%**

**Knowledge of the personal aspects of a conservatee's life and ability to address those special situations or circumstances affecting a conservatee (includes but not limited to):**

- |   |   |
|---|---|
| 2.1 Cultural/religious diversity              | 2.5 Family Dynamics                                   |
| 2.2 Mental Illness, intellectual disabilities | 2.6 Social history, values and beliefs of conservatee |
| 2.4 Difficult Clients                         |   |

**3. APPLICATION OF SURROGATE DECISION-MAKING – 12%**

**Knowledge of theory and application of decision making principles and limitations in making surrogate decisions (includes but not limited to):**

- |                                    |                                   |
|------------------------------------|-----------------------------------|
| 3.1 Functional Assessments         | 3.5 Limits to Fiduciary Authority |
| 3.3 Least Restrictive Alternatives | 3.6 Fiduciary Responsibility      |
| 3.4 Capacity                       |                                   |



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- 4. KNOWLEDGE OF LAWS, COURTS AND LEGAL PROCESSES – 15%**  
**Knowledge of laws, courts and legal processes governing fiduciary relationships and the conservator’s responsibility to modify, terminate or limit a conservatorship (includes but not limited to):**
- 4.1 Due Process
  - 4.2 Conservatee Rights
  - 4.4 Supervision/Sanctions/Surcharge
  - 4.5 Modification of Conservatorships and Trusts
  - 4.6 Compliance with monitoring systems
  - 4.7 Financial Powers of Attorney
- 5. PERSONAL MANAGEMENT – 14%**  
**Knowledge and application of the responsibilities of the conservator of the person including planning, monitoring, and overseeing supports and services (includes but not limited to):**
- 5.1 Needs Assessment
  - 5.2 Care Plans/reports
  - 5.3 Residential Placement
  - 5.4 Well-being Oversight/Monitoring
  - 5.5 Abuse/neglect/exploitation
  - 5.7 Community Resources
- 6. FINANCIAL MANAGEMENT – 16%**  
**Knowledge and application of the responsibilities for financial management of a client’s estate and assets (includes but not limited to):**
- 6.1 Inventory/Marshal Resources
  - 6.5 Asset Safekeeping and Protection
  - 6.6 Public Benefits (SSA, VA, Medicare, etc.)
  - 6.11 Trusts/Trust Management
  - 6.12 Prudent Investment Principles
  - 6.14 Financial Planning/Budgeting
- 7. MEDICAL DECISION-MAKING – 12%**  
**Knowledge and application of the principles and responsibilities surrounding medical decisions, including the ability to identify issues that have legal and ethical consequences for both the fiduciary and the conservatee (includes but not limited to):**
- 7.1 End-of-Life Care
  - 7.2 Special Medical Decisions/Conditions
  - 7.3 Medical Advocacy
  - 7.4 DNR/Withhold/Withdraw
  - 7.5 Powers of Attorney for Health Care