



CA CORE COMPETENCIES Percentages on Exams 2020

1. PROFESSIONAL PRACTICES – 17%

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

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|---|------------------------------|
| 1.1 Ethics/Standards/Professional Conduct | 1.5 Conflict of Interest |
| 1.2 Alternatives to Court Fiduciaries | 1.7 Practice Management/Fees |
| 1.4 Confidentiality | 1.8 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):

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|---------------------------------|--|
| 2.1 Cultural Diversity | 2.5 Family Dynamics |
| 2.2 Mental Illness/disabilities | 2.6 Social History, Values and Beliefs |
| 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):

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

4. KNOWLEDGE OF LAWS, COURTS AND LEGAL PROCESSES – 15%

Knowledge of laws, courts and legal processes governing conservatorship and the conservator's responsibility to modify, terminate or limit a guardianship (includes but not limited to):

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|---------------------------------------|----------------------------------|
| 4.1 Due Process | 4.5 Modification |
| 4.2 Conservatee Rights | 4.6 Compliance/Monitoring |
| 4.3 Relationships/Other Court Offices | 4.7 Financial Powers of Attorney |
| 4.4 Supervision/Sanctions | 4.8 Mediation |

5. PERSONAL MANAGEMENT – 14%

Knowledge and application of the responsibilities of the conservator of the person including planning for and overseeing supports and services (includes but not limited to):

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|---------------------------|--------------------------------|
| 5.1 Needs Assessment | 5.4 Well-being Monitoring |
| 5.2 Care Plans/Reports | 5.5 Abuse/Neglect/Exploitation |
| 5.3 Residential Placement | 5.7 Resources |

6. FINANCIAL MANAGEMENT – 16%

Knowledge and application of the responsibilities for financial management of a conservatee's or beneficiary'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, Railroad, Medicare)

6.11 Trust Management

6.12 Prudent Investment Principles

6.13 Consulting with Other Professionals

6.14 Financial Planning/Budgeting

7. MEDICAL DECISION-MAKING – 12%

7.1 End-of-Life Care

7.2 Special Medical Decisions/Conditions

7.3 Medical Advocacy

7.4 DNR/Withhold/Withdraw

7.5 Power of Attorney for Health Care