



CGC California Examination Handbook



1. APPLY FOR CA PROFESSIONAL FIDUCIARY EXAMINATION

Please ensure you are eligible to sit for the CGC CA Professional Fiduciary Examination by receiving an Eligibility Number from the state of California. An online application must be submitted to CGC prior to registering to take the California Professional Fiduciary Examination. The application can be found on the CGC website under the section "Become Certified".

The allotted time for the CA Professional Fiduciary Examination First time testing is as follows:

First Time Testers = NCG/CA = 2 hours long

The allotted time for re-testing is as follows:

Second/Third/Fourth and Fifth Time Testers for both portions of the exam = 2 hours long

Second/Third/Fourth and Fifth Time Testers for one portion of the exam = 1 hour long

When completing an online application for the CA Professional Fiduciary Examination, you will be prompted to upload the following documents:

- Two required signature pages
- Copy of current degree, certification, or licensure specifically related to guardianship
- Documentation confirming the completion of 30 hours of pre-licensing education or approval from the CA Professional Fiduciaries Bureau

The CGC Examination Application has a fee of \$385 for first time testers. There is a \$100 non-refundable fee if you wish to cancel your application.

The CGC CA Professional Fiduciary Examination Application for re-testing has a fee of \$275 for second/third/fourth and fifth time testers. There is a \$100 non-refundable fee if you wish to cancel your application. Also, please note, the state of CA has a deadline date of one year for you to complete the testing process successfully. After the one year deadline date, you will be required to re-apply with the state for the CA licensing. You will also have to pay the full amount of \$385 to test again with CGC.

All payments must be submitted online through the CGC website. Please note the payment process is secure, and your credit card information will be encrypted. Credit cards accepted by CGC include: MasterCard, Visa, and Discover. All others requesting exemption must contact CGC.

Upon receipt of your completed CGC CA Professional Fiduciary Examination Application and required forms, CGC will conduct education and employment verification and state criminal background checks. State criminal background checks and education verification will be conducted by a third party vendor, Certiphi, on behalf of CGC. Individuals approved to continue the application process will receive an email from Certiphi asking for completion and payment for a background check and educational verification. Until this process is complete, the applicant will not be approved to sit for the examination.

It may take a minimum of 45 Business Days to process your application and to approve you to sit for the exam. If your application is missing required information, or verification issues arise, it may result in a delay of the approval process. If, through the verification processes required by CGC, the applicant is not permitted to sit for the examination, CGC will retain the \$100.00 non-refundable application fee.

Once CGC approves your application to sit for the CGC CA Professional Fiduciary Examination, you will receive an email at the email address you supplied on your application verifying your approval from CGC. ADA requests will be honored if the appropriate document is received, and the Professional Fiduciary Bureau approves the request. Please contact the CGC office to request an ADA form.

2. SCHEDULE THE CA PROFESSIONAL FIDUCIARY EXAMINATION

The exam will be administered by PSI Testing Centers. You should receive a “Candidate Information Bulletin” from PSI in the next several days. Please use the information included in that bulletin to schedule your exam [online](#) or contact PSI by phone at 877-392-6422. When scheduling your exam online, please select Government/State Licensing Agencies, California, and Professional Fiduciaries Bureau. You should then see only the Professional Fiduciary Exam in the list of exams available for you. If, after several business days, you are unable to set-up testing, please contact the Professional Fiduciaries Bureau at 916-574-8375 for assistance.

Please note: You will be required to show proof of a **valid government-issued identification with signature** such as: Picture ID – Valid Driver’s License, Valid Military ID, and Valid Passport. The only items you are permitted to have with you during testing are your keys, your valid form of ID, and confirmation letter from the testing center. The testing centers may videotape all examinees during the exam process.

TEST CENTER SCHEDULES

Most test centers are open five or six days per week during normal business hours, based on local conditions, throughout the year.

TEST CENTER LOCATIONS

There are examination centers in most major cities throughout the nation.

APPOINTMENT CONFIRMATION LETTER

Upon completion of the scheduling process, the testing center will email an exam appointment confirmation to you, which will confirm your appointment and provide information about the location of the test center. Print this letter and take it to the test center with you when you go to take your exam.

CHANGES TO YOUR APPOINTMENT

Once you make an appointment, you will be allowed to re-schedule your exam without penalty 2 or more calendar days prior to your appointment. If you do not cancel at least 2 days in advance and do not appear for your exam at your scheduled location on your scheduled date and time, you will be considered a “no-show”. If you are considered a “no-show” you will be charged the entire application and examination fee, and a re-test fee will be required to reschedule your appointment.

TEST CENTER CLOSINGS DUE TO WEATHER OR OTHER EMERGENCY

If severe weather or other local emergency requires a test center to be closed, every attempt will be made to contact you. However, if you are unsure if your test center is open on the day of your exam, you should call the testing center where you have scheduled your appointment. If the center is open, it is your responsibility to keep the appointment. If the center is closed, you will be given the opportunity to reschedule without penalty.

3. TAKING THE CA PROFESSIONAL FIDUCIARY EXAMINATION

ARRIVE AT THE TEST CENTER EARLY

Plan your travel carefully so that you will arrive at the testing center at least 30 minutes before the scheduled appointment time. You will not be admitted to the test center if you arrive after your scheduled starting time. If you are considered a “no-show” you will be charged the entire application fee, plus a re-test to reschedule your appointment.

BRING YOUR EXAM APPOINTMENT CONFIRMATION WITH YOU

You should bring the exam appointment confirmation email that you received from the testing center with you to the examination location. This letter contains important information that will allow the test administrator to locate your record and be able to admit you to the exam.

BRING PERSONAL IDENTIFICATION

Testing requires very strict security measures. One level of security involves your identification. **You must present at least one form of valid government-issued identification bearing a photo and signature.**

Acceptable forms of official photo identification include:

- Driver's license with photo
- Passport
- Military ID
- State ID
- Resident alien ID

ID cards with a physical description but no photo generally are not acceptable. IDs are only valid through the expiration date printed on them. No photocopies or faxes will be accepted. **If you do not present acceptable identification, you will not be allowed to take your exam and you will be considered a "no-show" even though you appeared at the exam site.** If you are considered a "no-show" you will be charged the entire application and examination fee, plus a penalty to reschedule your appointment. You will not be permitted to sit for the exam if you do not have a current ID at the exam location.

BREAKS

There are no scheduled breaks during the exam. You are allowed to take a restroom break, but any time taken for breaks counts towards the overall time allotment for that exam part. You will need to check out/in with the exam proctor if you leave the testing room.

4. FINISHING

When you finish the exam, leave the testing room quietly. The test center staff will dismiss you after completing all necessary procedures. Please do not ask the proctors any questions concerning the exam contents or exam scores as they will not be able to assist you.

You will not receive your exam scores at the test center. Your exam results will be emailed to you from CGC in approximately 14 business days. Each portion of the CA Professional Fiduciary Examination will be graded separately and you must pass both portions in order to become licensed. The passing score for both the California portion and the National exam portion is 74%. Your exam results will not include the exam scores; only pass/fail information will be provided.

RETAKE THE CA PROFESSIONAL FIDUCIARY EXAMINATIONS

If you do not achieve a passing score on all required exam portions, you are required to retake the portion(s) that you did not pass. You can apply online to request another exam attempt and submit a retest payment of \$275. California examinees are only permitted to take the exam five (5) times within their one-year eligibility period. If you do not successfully pass both portions of the examination after taking it five (5) times, you must re-apply with the state for the licensing application and submission, and pay the appropriate amount. After you have completed the application process with the CA Professional Fiduciaries Bureau, you can then re-apply for the CGC CA Professional Fiduciary Examination. The fee for this exam is \$385.

EXAM MISCONDUCT NOTICE

Test center staff is trained to watch for unusual behavior and incidents during the exam. Exam sessions may be audio/video recorded to document the occurrence of any unusual activity, and candidate misconduct will be reported to CGC for investigation.

If you violate any of the testing rules, attempt to remove test items from the center, or are disruptive to other candidates, your exam may be terminated and/or your test scores invalidated.

CGC considers candidate misconduct related to the certification process a serious breach of the CGC Rules and Regulations. If evidence of misconduct is discovered after a candidate has been awarded CGC certification, the certification may be revoked. CGC may also take other actions to the extent permitted by law.

REPORTING EXAM CONCERNS

If you have questions, comments, or concerns regarding the testing experience or with exam questions, please e-mail them to certification@guardianshipcert.org.

IMPORTANT REMINDER – Your application is only current for one year. After the one year deadline, if you have not passed both portions of the exam, you would have to start the entire process over again with both the Professional Fiduciary Bureau and CGC.