ABOUT THE EXAMINATION

Passing the California Professional Fiduciary Licensing Examination is mandatory for licensure as a professional fiduciary in the State of California. The purpose of the examination is to protect consumers by identifying professional fiduciaries that are competent to assume and maintain the responsibilities of managing professional fiduciary services.

The licensing agency is the Professional Fiduciaries Bureau (Bureau) within the California Department of Consumer Affairs (Department). All questions regarding licensing should be directed to:

Professional Fiduciaries Bureau
1625 N. Market Blvd., Ste. S-209
Sacramento, CA 95834
(916) 574-7340
www.fiduciary.ca.gov
fiduciary@dca.ca.gov

The Center for Guardianship Certification (CGC) is responsible for the development and maintenance of the licensing examination for California Professional Fiduciaries. Further, CGC is responsible to ensure that examination validation testing and measurement methodologies are in compliance with professional standards and California law. This produces an examination that is psychometrically sound and legally defensible.

Ongoing maintenance of the examination by CGC keeps the examination current and accurately measures competency in the required knowledge areas.

All questions regarding the examination should be directed to:

Center for Guardianship Certification
P.O. Box 5704
Harrisburg, PA 17110-5704
(717) 238-4689
http://www.guardianshipcert.org/

EXAMINATION ADMINISTRATION

PSI has contracted to administer the California Professional Fiduciary Licensing Examination. PSI provides testing through a network of computer examination centers in California and some out of state sites.

All questions regarding the administration of the examination by PSI or scheduling should be directed to:

PSI licensure: certification
3210 E Tropicana
Las Vegas, NV 89121
(877) 392-6422  •  Fax (702) 932-2666
https://test-takers.psiexams.com/capfb

EXAMINATION INFORMATION

The two-hour examination is designed to gauge your understanding of the responsibilities of serving as a professional fiduciary in California.

PASSING THE EXAMINATION

The passing score is based upon minimally acceptable competence criteria that represents the skills required for entry-level practice. The passing score is established by CGC. Passing the examination is required before licensure.

After taking the examination, CGC and the Bureau will notify you of your pass or fail status via email. Once you pass the examination and fulfill all requirements of the Licensing Application Package, the Bureau will notify you of your approval for licensure. You may also retrieve your examination results from the CGC website by using the examination results number issued to you by CGC.

Upon approval and receipt of the licensing fee, the Bureau will issue you a license as a California Professional Fiduciary. When you pass the examination, CGC will certify you as a National Certified Guardian.

APPLYING FOR THE EXAMINATION

To take the examination you must follow these three steps:

First, submit a Licensing Application Package to the Bureau for a determination of eligibility to sit for the examination. To receive a Licensing Application Package, visit the Bureau’s website at www.fiduciary.ca.gov, or contact the Bureau directly at (916) 574-7340. Once approved to take the examination, the Bureau will issue you an examination eligibility number.

Once eligible, submit an Examination Application to CGC. You may access the online application from the CGC website at http://www.guardianshipcert.org/ and submit it along with the application fee directly to CGC. The application process with CGC will require you to go through a background check to verify your identity and educational background, as well as check that no felonies are on your record. You will be eligible for twelve (12) months to take and pass the examination once you have received approval from CGC.

Finally, contact PSI to schedule the examination. You will need your examination eligibility number to complete this process.

SCHEDULING THE EXAMINATION

MAKING AN APPOINTMENT

PSI is responsible for the administration and scheduling of the examination. You may make an appointment to take the examination at https://test-takers.psiexams.com/capfb, or by telephone at (877) 392-6422. You must have your examination eligibility number to schedule your appointment.

In most California testing centers, testing does not take place on the following major holidays:

<table>
<thead>
<tr>
<th>Holiday</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memorial Day</td>
<td>Closed May 29, 2023</td>
</tr>
<tr>
<td>Independence Day</td>
<td>Closed July 4, 2023</td>
</tr>
<tr>
<td>Labor Day</td>
<td>Closed September 4, 2023</td>
</tr>
<tr>
<td>Thanksgiving Day</td>
<td>Closed November 23-24, 2023</td>
</tr>
<tr>
<td>Christmas Day</td>
<td>Closed December 25-26, 2023</td>
</tr>
<tr>
<td>New Years Day</td>
<td>Closed January 1, 2024</td>
</tr>
<tr>
<td>Martin Luther King Jr.</td>
<td>Closed January 17, 2024</td>
</tr>
</tbody>
</table>
ONLINE SCHEDULING

You may schedule your examination by completing the online Test Registration Form. The Test Registration Form is available at PSI’s website, https://test-takers.psiexams.com/capfb. You may schedule an examination via the Internet 24 hours a day.

Log onto PSI’s website and select Sign in / Create Account. Select Create Account. You are now ready to pay and schedule for the exam. Enter your zip code and a list of the testing sites closest to you will appear. Once you select the desired test site, available dates will appear.

TELEPHONE SCHEDULING

Call PSI at (877) 392-6422, Monday through Friday between 4:30 AM and 7:00 PM, and Saturday through Sunday between 6:00 AM and 2:30 PM, Pacific Time, to schedule your appointment for the test. You must provide your examination eligibility number. TDD service is available at (800) 735-2929.

RE-TAKING THE EXAMINATION

You may re-take the examination a total of four times not to exceed one examination attempt every thirty (30) days within your 12-month eligibility period as determined by the Bureaus.

To re-take the examination, you must first visit the CGC website at www.guardianshipcert.org, sign in to your account, complete a Retest Application, and remit the appropriate fee to CGC. Once you receive your approval email to retest, you must then contact PSI to schedule a new appointment to take the examination. You are responsible for paying the sitting fee to PSI for each re-take: $33.55.

CANCELLING AN EXAMINATION APPOINTMENT

You may cancel and reschedule an examination appointment without forfeiting your fee if your cancellation notice is received two (2) days prior to the scheduled examination date. For example, for a 9:00 a.m. Monday appointment, the cancellation notice would need to be received before 9:00 a.m. on the previous Saturday. You may call PSI at (877) 392-6422.

Note: A voicemail or email message is NOT an acceptable form of cancellation. Please use the PSI Website or call PSI and speak directly to a Customer Service Representative.

MISSED APPOINTMENT OR LATE CANCELLATION

If you miss your appointment, you will not be able to take the examination as scheduled. You will forfeit your examination fee, if:

1. You do not cancel your appointment two days before the scheduled examination date;
2. You do not appear for your examination appointment;
3. You arrive after your examination start time; or
4. You do not present proper identification when you arrive for the examination.

EXAMINATION SITE CLOSING FOR AN EMERGENCY

In the event that severe weather or another emergency forces the closure of an examination site on a scheduled examination date, your examination will be rescheduled. PSI personnel will attempt to contact you in this situation. However, you may check the status of your examination schedule by calling PSI ahead of time. Every effort will be made to reschedule your examination at a convenient time as soon as possible. You will not be penalized. You will be rescheduled at no additional charge.

SPECIAL ACCOMMODATIONS

CGC is responsible for the determination and approval of all special accommodation requests.

If you have a physical or mental impairment that substantially limits a major life activity you may be eligible for special accommodations in the testing process to assure that the tests accurately reflect your competency in the required knowledge areas. “Major life activities” include walking, seeing, hearing, speaking, breathing, learning, working, caring for oneself, and performing manual tasks.

If you require special accommodations, you must submit a completed Special Accommodations Request Form to CGC for approval. You may obtain the form off the CGC website at http://www.guardianshipcert.org/ or by contacting CGC via email at certification@guardianshipcert.org to request one. This form requires you to describe the nature of your disability and its limitations related to the examination, the type of accommodation or modification requested, and supporting documentation. The supporting documentation must bear the name, professional title, original signature, license number and telephone number of your physician, medical authority or other qualified professional.

PSI is fully compliant with the Americans with Disabilities Act and provides reasonable accommodations for candidates whose request for special accommodations has been granted by CGC. Reasonable accommodations are those that do not fundamentally alter the examination or results. Any auxiliary aids and services provided must be approved by CGC. Scheduling services are available for the hearing-impaired via PSI’s Telecommunications Device for the Deaf (TDD) by calling (800) 735-2929.

REPORTING TO EXAMINATION SITE

On the day of the examination, you must arrive at least thirty (30) minutes prior to your scheduled appointment time. This allows time for check-in and identification verification and provides time to familiarize yourself with the examination process. If you arrive late, you may not be admitted to the examination site and you may forfeit your examination registration fee. Even though candidates will be thumb printed, you are still required to comply with any identification requirements established by the appropriate regulatory entity.
REQUIRED IDENTIFICATION AT THE EXAMINATION SITE

You must provide one of the following valid forms of government-issued identification before taking the examination:

1. An unexpired State issued driver’s license;
2. An unexpired State Department of Motor Vehicles Identification Card;
3. A current U.S. military-issued identification card;
4. An unexpired passport; or

All photographs must be recognizable as the person to whom the identification card was issued. The name on the application must match the photographic I.D. card.

Failure to provide the required identification at the time of the examination without notifying PSI is considered a missed appointment, and you will not be able to take the examination.

IMPORTANT INFORMATION ABOUT TAKING AN EXAMINATION

1. All candidates will have their thumbprint taken during examination check-in. The thumb print must be matched after candidates return from a restroom break and any time the candidate leaves and returns to the test site after check-in.

2. The temperature in the testing room is maintained at a moderate level. Candidates are advised to layer clothing. Acceptable layered clothing includes lightweight shirts, sweaters, and pullovers without pockets or hoods. These items must be worn upon check-in, while you wait to enter the testing room, and during your initial seating for the examination. If the layered item is removed during the examination, you will be required to store it in the lobby while time continues to count down on your examination. Outerwear (coats, heavy jackets, vests, shawls, scarves, etc.) is not allowed in the testing rooms.

3. There are timing mechanisms available in the testing room and on the computer console to help candidates keep track of time during the test administration. Candidates are not permitted to bring watches or other timekeeping devices into the testing rooms.

4. Only one candidate will be allowed to take a restroom break at a time. Candidates are required to sign out when leaving and returning to the testing room. If a candidate’s restroom break takes longer than 5 (five) minutes, a proctor will check on the candidate and will notify the applicable regulatory entity of the occurrence. The regulatory entity will investigate and take appropriate action.

5. The following is a non-exhaustive list of personal items that are not permitted in the testing rooms:

<table>
<thead>
<tr>
<th>Items</th>
<th>Good luck items</th>
<th>Luggage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calculators</td>
<td>Reading materials</td>
<td>Notes</td>
</tr>
<tr>
<td>Textbooks</td>
<td>Any recording device</td>
<td></td>
</tr>
<tr>
<td>Electronic devices</td>
<td>Smart devices</td>
<td></td>
</tr>
<tr>
<td>Personal pens or pencils</td>
<td>Therapeutic items</td>
<td>Headphones or earphones/earbuds</td>
</tr>
<tr>
<td>Cameras</td>
<td>Over-the-counter medication</td>
<td></td>
</tr>
<tr>
<td>Weapons</td>
<td>Fashion scarves</td>
<td></td>
</tr>
<tr>
<td>Hats/baseball caps/visors</td>
<td>Sunglasses**</td>
<td></td>
</tr>
<tr>
<td>Bulky, large or noisy</td>
<td>Prescription drugs***</td>
<td></td>
</tr>
<tr>
<td>jewelry***</td>
<td>Hues</td>
<td></td>
</tr>
</tbody>
</table>

*Headwear worn for religious purposes is subject to inspection.
**Prescription and non-prescription eyeglasses may not be worn for the photo. Eyeglasses subject to inspection.
***Jewelry that is allowed into the examination room is subject to inspection.
****Drugs that are medically necessary during the pendency of the examination may be brought into the examination site, in a container bearing a proper prescription label with the name of the candidate and of the drug; any such medication is subject to examination by a proctor upon check-in.

Examination proctors will have considerable discretion to refuse permission of clothing and/or items that compromise the integrity or security of the examination.

During the check-in process, all candidates will be asked if they possess any of the prohibited items and all candidates will be asked to empty their pockets. If prohibited items are found during check-in, candidates must return these items to their vehicle or other place of safekeeping.

Neither PSI nor the Department of Consumer Affairs will be responsible for the items. Any candidate possessing prohibited items in the testing room will have his or her examination results invalidated, and PSI will notify the appropriate regulatory entity of the occurrence.

6. Shoes must be worn at all times and feet are not permitted on the chairs. Feet must remain on the floor during examinations.

7. Copying any portion of the examination content by any means, or communicating examination content for the purpose of aiding its unauthorized reproduction, whether before, during, or after the examination, is a violation of PSI security policy and existing law. Either one may result in the disqualification or invalidation of examination results, the denial of your license, and may result in criminal prosecution.

8. If a candidate is asked by a proctor to step into the lobby during your examination, the proctor will suspend the candidate’s examination, so all remaining test time will be retained.

Only candidates, and those individuals with prior regulatory entity approval, are allowed to be present in the testing sites.

If candidates require that an exception be made to ANY of the abovementioned security procedures, candidates must contact their regulatory entity PRIOR to the date of their examination. The regulatory entity must provide the exception to PSI. NO EXCEPTIONS WILL BE MADE ON THE DAY OF THE EXAMINATION.
EXAMINATION BY COMPUTER

The examination will be administered via computer. You will be using a mouse and computer keyboard.

IDENTIFICATION SCREEN

You will be directed to a semiprivate testing station to take the examination. When you are seated at the testing station, you will be prompted to confirm your name, identification number, and the examination for which you are registered.

TUTORIAL

Before you start your examination, an introductory tutorial is provided on the computer screen. The time you spend on this tutorial, up to 15 minutes, DOES NOT count as part of your examination time. Sample questions are included following the tutorial so that you may practice answering questions, and reviewing your answers.

TEST QUESTION SCREEN

The “function far” at the top of the test question screen provides mouse-click access to the features available while taking the examination.

One question appears on the screen at a time. During the examination, minutes remaining will be displayed at the top of the screen and updated as you record your answers.

IMPORTANT: You have two hours to take the examination. After you have entered your responses, you will later be able to return to any question(s) and change your response, provided there is still time left.
EXAMINATION CONTENT

KNOWLEDGE AREAS

The examination requires you to demonstrate a basic understanding of responsibilities of serving as a professional fiduciary in California. Following is the outline that identifies particular knowledge areas of the examination:

EXAMINATION OUTLINE

100 PROFESSIONAL PRACTICES

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

101 Keep client matters confidential
102 Communicate ethically
103 Comply with PFB laws and regulations
104 Advocate for client needs and preferences
105 Avoid conflicts of interest
106 Insure fiduciary practice
107 Maintain professional fiduciary license
108 Secure/store client medical and personal records
109 Determine ability to handle client needs
110 Comply with bonding requirements
111 Protect conservatees’ rights
112 Plan for fiduciary practice contingencies

200 CLIENT RELATIONS

Knowledge of the personal aspects of the client’s life, and the ability of the fiduciary to address those special situations or circumstances (includes but not limited to):

201 Respect boundaries between fiduciary and client
202 Assess clients’ current financial and legal needs
203 Communicate with client and clients’ family, friends, and service providers
204 Manage complex family dynamics
205 Assess clients’ current medical, physical, social and psychological needs
206 Determine level of care required to meet client needs
207 Determine clients’ ability to manage cash and assets
208 Assess clients’ functional capacities
209 Identify clients’ preferences (personal, cultural, religious)

300 FINANCIAL MANAGEMENT

Knowledge and application of decision-making principles and limits to fiduciary decisions (includes but not limited to):

301 Retain documents
302 Budget for client needs
303 Manage funds to support long-term financial solvency
304 Reconcile active accounts of client/estate
305 Monitor investment accounts
306 Manage tax obligations of clients/estate
307 Interpret financial statements
308 Conduct financial reviews and audits
309 Buy, sell, and manage real property
310 Liquidate client/estate assets
400 FINANCIAL ASSESSMENT AND PLAN DEVELOPMENT
Knowledge and application of the responsibilities for assessing a conservatee’s or beneficiary’s financial needs and resources, and developing a plan to meet those needs (includes but not limited to):

401 Implement estate plan to meet clients’ financial and legal needs
402 Marshal client/estate assets
403 Establish accounts for the management of client/estate funds
404 Secure tangible assets
405 Evaluate client/estate insurance needs
406 Safeguard intangible assets
407 Notify entities about the fiduciary relationship
408 Appraise client/estate assets
409 Collect unclaimed property and hidden/missing assets

500 LAWS, COURTS, AND LEGAL PROCESSES
Knowledge of laws, courts, and legal processes governing conservatorships/trusts (includes but not limited to):

501 Respect limits to fiduciary powers
502 Apply the Uniform Prudent Investor Act
503 Account for fiduciary estate
504 Distribute assets
505 Use support decision-making
506 Submit fiduciary court documents
507 Gain court approval when required
508 Apply substituted judgement

600 PERSONAL MANAGEMENT
Knowledge and application of the responsibilities of the conservator of the person (includes but not limited to):

601 Monitor to ensure client well-being and safety
602 Advocate for client medical preferences
603 Identify indicators that client may be at risk for abuse, neglect, and exploitation
604 Report suspected abuse, neglect and exploitation
605 Conduct wellness checks
606 Identify community, government and private resources for meeting client needs
607 Use health care documents that guide fiduciary decision-making
608 Make residential placement decisions
EXAMINATION SECURITY LAWS

BUSINESS AND PROFESSIONS CODE SECTIONS

123. It is a misdemeanor for any person to engage in any conduct which subverts or attempts to subvert any licensing examination or the administration of an examination, including, but not limited to:

a. Conduct which violates the security of the examination materials; removing from the examination room any examination materials without authorization; the unauthorized reproduction by any means of any portion of the actual licensing examination; aiding by any means the unauthorized reproduction of any portion of the actual licensing examination; paying or using professional or paid examination-takers for the purpose of reconstructing any portion of the licensing examination; obtaining examination questions or other examination material, except by specific authorization either before, during, or after an examination; or using or purporting to use any examination questions or materials which were improperly removed or taken from any examination for the purpose of instructing or preparing any applicant for examination; or selling, distributing, buying, receiving, or having unauthorized possession of any portion of a future, current, or previously administered licensing examination.

b. Communicating with any other examinee during the administration of a licensing examination; copying answers from another examinee or permitting one's answers to be copied by another examinee; having in one's possession during the administration of the licensing examination any books, equipment, notes, written or printed materials, or data of any kind, other than the examination materials distributed, or otherwise authorized to be in one's possession during the examination; or impersonating any examinee or having an impersonator take the licensing examination on one's behalf.

Nothing in this section shall preclude prosecution under the authority provided for in any other provision of law.

In addition to any other penalties, a person found guilty of violating this section, shall be liable for the actual damages sustained by the agency administering the examination not to exceed ten thousand dollars ($10,000) and the costs of litigation.

c. If any provision of this section or the application thereof to any person or circumstances is held invalid, that invalidity shall not affect other provisions or applications of the section that can be given effect without the invalid provision or application, and to this end the provisions of this section are severable.

123.5 Whenever any person has engaged, or is about to engage, in any acts or practices which constitute, or will constitute, a violation of Section 123, the superior court in and for the county wherein acts or practices takes place, or are about to take place, may issue an injunction, or other appropriate order, restraining such conduct on application of a board, the Attorney General or the district attorney of the county.

The proceedings under this section shall be governed by Chapter 3 (commencing with Section 525) of Title 7 of Part 2 of the Code of Civil Procedure.

The remedy provided by this section shall be in addition to and not a limitation on, the authority provided for in any other provision of law.

496. A board may deny, suspend, revoke, or otherwise restrict a license on the ground that an applicant or licensee has violated Section 123 pertaining to subversion of licensing examination.

584. No person shall violate the security of any examination, as defined in subdivision (a) of Section 123, or impersonate, attempt to impersonate, or solicit the impersonation of, another in any examination for a license, certificate, or registration to practice as provided in this division, the Osteopathic Act, or the Chiropractic Initiative Act, or under any other law providing for the regulation of any other system or method of treating the sick or afflicted in this state.
EXAMINATION SITE LOCATIONS

PSI examination centers in California:

AGOURA HILLS
30851 AGOURA RD SUITE 302
AGOURA HILLS, CA 91301
(818) 851-9266

ATASCADERO
7305 MORRO RD, SUITE 201A
ATASCADERO, CA 93422
(805) 538-5053
FROM US-101 N, TAKE THE CA-41 EXIT (EXIT 219) TOWARD MORRO RD. TURN LEFT ONTO EL CAMINO REAL. TURN LEFT ONTO CA-41/MORRO RD.
FROM US-101 S, TAKE THE MORRO RD/CA-41 EXIT (EXIT 219), TURN RIGHT ONTO CA-41/MORRO RD.

BAKERSFIELD
5405 STOCKDALE HIGHWAY SUITE 103
BAKERSFIELD, CA 93309
(661) 735-5351
FROM INTERSTATE 5-SOUTH, TAKE THE STOCKDALE HIGHWAY EXIT (EXIT 253). TURN RIGHT ONTO STOCKDALE HIGHWAY. END AT 5405 STOCKDALE HIGHWAY.
FROM INTERSTATE 5-NORTH TOWARD BAKERSFIELD, KEEP LEFT TO TAKE CALIFORNIA 99 NORTH VIA EXIT 221 TOWARD BAKERSFIELD/FRESNO. TAKE THE CALIFORNIA 58 EAST EXIT TOWARD TEHACHAPI/MOJAVE. TAKE THE EXIT ON THE LEFT TOWARD CALIFORNIA STATE UNIVERSITY/STOCKDALE HIGHWAY/BRUNDAGE LANE. TURN LEFT ONTO WIBLE ROAD. TURN SLIGHT LEFT ONTO STOCKDALE HIGHWAY. END AT 5405 STOCKDALE HIGHWAY.

CARSON
17420 S AVALON BLVD, SUITE 205
CARSON, CA 90746
(310) 400-7393
FROM CA-91 E/GARDENA FWY TAKE THE AVALON EXIT. OFF RAMP WILL LEAD YOU ONTO ALBERTONI ST. MAKE A RIGHT ONTO AVALON BLVD AND WE ARE LOCATED ON THE RIGHT HANDSIDE (SAME PARKING LOT AS CARL'S JR).

FROM CA-91 W TAKE THE AVALON EXIT. MAKE A LEFT ONTO AVALON BLVD. MAKE A U-TURN ON AVALON BLVD AND ALBERTONI ST. WE ARE LOCATED ON THE RIGHT-HAND SIDE. (SAME PARKING LOT AS CARL'S JR).

DIAMOND BAR
21660 EAST COLEY DR SUITE 215
DIAMOND BAR, CA 91765
(909) 860-8119
FROM I-10 E, TAKE THE GRAND AVE EXIT (EXIT 38A). TURN RIGHT ONTO S GRAND AVE. TURN RIGHT ONTO GOLDEN SPRINGS DR. TURN LEFT ONTO COLEY DR.
FROM 60 WEST, TAKE GRAND AVE EXIT (EXIT 24B). TURN LEFT ONTO GRAND AVE. TURN RIGHT ONTO GOLDEN SPRINGS DR. TURN LEFT ONTO COLEY DR. 21660 COLEY DR, STE 260 IS ON THE LEFT.

EL MONTE - SANTA FE SPRINGS
10330 PIONEER BOULEVARD, SUITE 285
SANTA FE SPRINGS, CA 90670
(562) 325-8113
FROM THE I-5 NORTH TAKE NORWALK BLVD (EXIT 121), TURN RIGHT ONTO NORWALK BLVD. TURN LEFT ONTO IMPERIAL HWY/CA-90. TURN RIGHT ONTO PIONEER BLVD, TESTING CENTER WILL BE ON YOUR RIGHT.

FRESNO
351 E. BARSTOW AVE, SUITE 101
FRESNO, CA 93710
(559) 538-3975
FROM CA-41 S, TAKE THE BULLARD AVE EXIT. TURN LEFT ONTO E BULLARD AVE. TURN RIGHT ONTO N FRESNO ST. PASS THROUGH THE INTERSECTION OF FRESNO AND BASTOW AVE. TAKE THE FIRST DRIVEWAY ON THE RIGHT-HAND SIDE.
FROM CA-41 N, TAKE THE SHAW AVE EXIT TOWARD CLOVIS. TURN RIGHT ONTO E SHAW AVE. TURN LEFT ONTO N FRESNO ST. TURN LEFT INTO THE LAST DRIVEWAY BEFORE BARSTOW AVE. TESTING CENTER IS IN THE OFFICE COMPLEX ON THE SW CORNER OF BARSTOW AND FRESNO ST.

IRVINE
8 CORPORATE PARK, SUITE 200
IRVINE, CA 92606
(949) 418-9653
FROM I-405 S - USE THE 2ND LANE FROM RIGHT TO TAKE EXIT 7 FOR JAMBOREE RD. THEN USE THE LEFT 2 LANES TO TURN LEFT ONTO JAMBOREE RD. GO ABOUT 1.5 MILES THEN TURN RIGHT ONTO BECKMAN AVE. TAKE THE FIRST RIGHT INTO CORPORATE PARK. 8 CORPORATE PARK IS THE SECOND BUILDING ON THE RIGHT.
FROM I-5 S - TAKE EXIT 100 FOR JAMBOREE RD. USE THE 2ND FROM RIGHT LANE TO TURN RIGHT ONTO JAMBOREE RD. TAKE THE RAMP TO JAMBOREE RD THEN KEEP LEFT AT THE FORK TO CONTINUE ONTO JAMBOREE RD. GO ABOUT 2.2 MILES THEN TURN LEFT ONTO BECKMAN AVE. TAKE THE FIRST RIGHT INTO CORPORATE PARK. 8 CORPORATE PARK IS THE SECOND BUILDING ON THE RIGHT.
ONCE PARKED, PROCEED THROUGH THE FRONT ENTRANCE AND TAKE THE ELEVATOR TO THE SECOND FLOOR. THE TEST CENTER IS IN SUITE 200.

LAWNDALE
THE BAYTOWER CORPORATE CENTER
15901 HAWTHORNE BLVD, SUITE 330
LAWNDALE, CA 90260
310-504-0004

REDDING
2861 CHURCH CREEK, UNIT C
REDDING, CA 96002
(530) 319-3615
FROM I-5 S, TAKE THE CYPRESS AVENUE EXIT (677). TURN RIGHT ONTO E. CYPRESS AVE. TURN RIGHT ON CHURCH CREEK RD.
FROM I-5 N TOWARDS SACRAMENTO, TAKE THE CYPRESS AVE EXIT (677). TURN LEFT ONTO E. CYPRESS AVE. TURN RIGHT ONTO CHURCH CREEK RD.
FROM 299 E TOWARDS REDDING, START GOING WEST ON CA-299. MERGE ONTO I-5 S RAMP ON THE LEFT TOWARDS SACRAMENTO. TAKE THE CYPRESS AVE EXIT (677). TURN LEFT ONTO E. CYPRESS AVE. TURN RIGHT ON CHURCH CREEK RD.


RIVERSIDE
7888 MISSION GROVE PARKWAY S., SUITE 130
RIVERSIDE, CA 92508
(951) 565-8037
FROM THE CA-91W TOWARD RIVERSIDE/BEAUTIFUL CITY, TAKE THE CENTRAL AVENUE EXIT TOWARD MAGNOLIA CENTER. TURN LEFT ONTO
CENTRAL AVE. CENTRAL AVE BECOMES ALESSANDRO BLVD. VEER TO THE RIGHT, THEN STAY STRAIGHT TO GO ONTO TRAUTWEIN RD (YOU WILL PASS COMMUNICATIONS CENTER DR). TURN LEFT ONTO MISSION GROVE PKWY W.


SACRAMENTO
8950 CAL CENTER DR, SUITE 158
BUILDING TWO
SACRAMENTO, CA 95826
(916) 476-5926.

FROM US-50 E: USE THE RIGHT TWO LAKES TO TAKE EXIT 11 FOR WATT AVE. USE THE 2 LAKES TO TURN RIGHT ONTO WATT AVE. USE THE LEFT LANE TO TURN LEFT AT THE FIRST CROSS STREET ONTO FOLSOM BLVD. USE THE LEFT TWO LAKES TO TURN LEFT ONTO MANLOVE RD. TURN LEFT ONTO CAL CENTER DR. BUILDING 8950 WILL BE ON THE LEFT.

FROM US-50 W: USE THE RIGHT TWO LAKES TO TAKE EXIT 11 FOR WATT AVE. USE THE LEFT LAKES TO TURN LEFT ONTO WATT AVE. USE THE LEFT LANE TO TURN LEFT AT THE FIRST CROSS STREET ONTO MANLOVE RD. TURN LEFT ONTO CAL CENTER DR. BUILDING 8950 WILL BE ON THE LEFT.

SAN DIEGO
5440 MOREHOUSE DRIVE, SUITE 3100
SAN DIEGO, CA 92121
(858) 550-5940.

FROM 1-805 S, TAKE THE SORRENTO VALLEY RD/MIRA MESA BLVD EXIT. TURN LEFT ONTO MIRA MESA BLVD, TURN LEFT ONTO SCRANTON ROAD. TURN RIGHT ONTO MOREHOUSE DRIVE.

FROM 1-805 N TOWARD LOS ANGELES, TAKE THE MIRA MESA BLVD/VISTA SORRENTO PKWY EXIT. TURN RIGHT ONTO MIRA MESA BLVD. TURN LEFT ONTO SCRANTON RD. TURN RIGHT ONTO MOREHOUSE DR.

ADDITIONAL PARKING CAN BE FOUND (ON TOP OF THE AT&T BUILDING) BY CONTINUING ON MOREHOUSE PAST OUR BUILDING AND TURNING LEFT AT THE NEXT DRIVING UP THE HILL.

SAN FRANCISCO
150 EXECUTIVE PARK BLVD., STE 2400
SAN FRANCISCO, CA 94134
(415) 494-5773.

I-80 W BECOMES US-101 S. TAKE EXIT 429A TOWARD MONSTER PARK/TUNNEL AVE. TAKE THE RAMP TOWARD 3COM PARK. TURN RIGHT ONTO ALANNA RD. TURN LEFT ONTO EXECUTIVE PARK BLVD.

SANTA CLARA
2936 SCOTT BLVD
SANTA CLARA, CA 95054
(408) 844-0008.


SANTA ROSA
160 WIKIUP DRIVE, SUITE 105
SANTA ROSA, CA 95403
(707) 791-3113.

FROM US-101 N, TAKE MARK WEST SPRINGS/RIVER ROAD EXIT. TURN RIGHT ON MARK WEST SPRINGS. TURN LEFT AT OLD REDWOOD HIGHWAY. TURN RIGHT ON WIKIUP DRIVE. FIRST DRIVING ON RIGHT.

FROM US-101 S, TAKE MARK WEST SPRINGS/RIVER ROAD EXIT. TURN LEFT ON MARK WEST SPRINGS. TURN LEFT AT OLD REDWOOD HIGHWAY. TURN RIGHT ON WIKIUP DRIVE. FIRST DRIVING ON RIGHT.

UNION CITY
32960 ALVARADO-NILES RD, SUITE 650
UNION CITY, CA 94587
(510) 400-3343.


VENTURA
4245 MARKET ST, SUITE 208
VENTURA, CA 93003
(805) 650-5220.

FROM US-101N, TAKE THE TELEPHONE ROAD (EXIT 65). TURN LEFT ONTO TELEPHONE ROAD. TURN RIGHT ONTO MARKET STREET.

VISALIA
3400 W MINERAL KING AVE, SUITE D
VISALIA, CA 93291
(559) 740-7781.

FROM CA-99N, MERGE ONTO CA-198E VIA EXIT 96 TOWARD VISALIA/SEQUOIA NAT’L PARK. TAKE THE EXIT TOWARD DEMAREE STREET. MERGE ONTO W NOBLE AVENUE. TURN LEFT ONTO S COUNTY CENTER DRIVE. TAKE THE 1ST LEFT ONTO W MINERAL KING AVENUE.

WALNUT CREEK
175 LENNON LANE, SUITE 203
WALNUT CREEK, CA 94598
(925) 448-2179.

FROM I-5N, KEEP LEFT TO TAKE I-580W TOWARD TRACY/SAN FRANCISCO. MERGE ONTO I-80N VIA EXIT 43B TOWARD SACRAMENTO/WALNUT CREEK/CONCORD. TAKE THE YGNACIO VALLEY ROAD EXIT AND TURN RIGHT. TURN LEFT ONTO LENNON LANE.

OUT-OF-STATE EXAMINATION SITE LOCATIONS

The following out-of-state sites will also offer this examination.

ALBUQUERQUE
2820 BROADBENT PARKWAY
SUITE E & F
ALBUQUERQUE, NM 87107
From I-40 W TAKE EXIT 159D, FOLLOW FRONTAGE RD. N TO MENAUL BLVD NE, MAKE A LEFT ONTO MENAUL BLVD NE, MAKE A RIGHT ONTO BROADBENT PKWY NE. BUILDING WILL BE ON THE RIGHT.

ATLANTA (MARIETTA)
2100 ROSWELL ROAD NE, SUITE 2128
MARIETTA, GA 30062
From I-75 NORTHBOUND, TAKE EXIT #263 - THE 120 LOOP, EAST TOWARD ROSWELL. DRIVE APPROXIMATELY 1.5 MILES (PAST POWERS FERRY AND LOWER ROSWELL ROADS) AND EXIT RIGHT TOWARD ROSWELL. MAKE A RIGHT AT THE LIGHT OFF OF THE EXIT AND ONTO ROSWELL ROAD. PAVILIONS AT EAST LAKE SHOPPING CENTER IS ½ MILE ON RIGHT.

From I-75 SOUTHBOUND, TAKE EXIT #265 - GA 120 LOOP/EAST. TURN LEFT ONTO NORTH MARIETTA PKWY. AFTER 1.4 MILES, TAKE THE RIGHT-SIDE OFF RAMP TO GA-3/ROSWELL/MARIETTA. TURN LEFT ONTO GA-120 EAST/ROSWELL RD. GO .3 MILE TO PAVILIONS AT EAST LAKE SHOPPING CENTER. TURN RIGHT INTO SHOPPING CENTER.
THE SITE IS LOCATED IN SUITE 2128 IN THE SAME SHOPPING CENTER AS KROGERS.

BRONX
34 MARCONI STREET, SUITE 210
BRONX, NY 10461
**PRESS IN THE CODE 26 TO ACCESS SUITE AFTER ARRIVAL AT BUILDING**

HEAD NORTH ON HUTCHINSON RIVER PKWY N. TAKE EXIT 3W FOR PELHAM PKWY W. MERGE ONTO BRONX AND PELHAM PKWY. USE THE RIGHT LANE TO TAKE THE HUTCHINSON PKWY S RAMP TO WHITESTONE BR QUEENS. MERGE ONTO HUTCHINSON RIVER PKWY S. TAKE EXIT 2 TOWARD WESTCHESTER AVE/E TREMONT AVE. TAKE A SLIGHT RIGHT TOWARDS WATERS PL. TURN RIGHT ONTO WATERS PL. TURN RIGHT ONTO MARCONI ST. THE OFFICE WILL BE ON YOUR LEFT.


CENTENNIAL
12150 E. BRIARWOOD AVE., SUITE 270
CENTENNIAL, CO 80112
EXIT I-25 AT ARAPAHOE ROAD. HEAD EAST ON ARAPAHOE (AWAY FROM THE MOUNTAINS) TO PEORIA (5 TRAFFIC LIGHTS). TURN RIGHT ON PEORIA AND LEFT ON BRIARWOOD.

CHARLOTTE
TYVOLA EXECUTIVE PARK 1
5701 WESTPARK DR., #101
CHARLOTTE, NC 28217
FROM I-77S TOWARDS COLUMBIA, EXIT TYVOLA ROAD (EXIT #5). TURN LEFT AT TYVOLA ROAD. MAKE A RIGHT AT WESTPARK DR. FROM I-77N, EXIT TYVOLA ROAD (EXIT #5). BEAR RIGHT AT TYVOLA ROAD. TURN RIGHT AT WESTPARK DR.

CHERRY HILL
950 N. KINGS HWY, SUITE 301
CHERRY HILL, NJ 08034

CHICAGO
332 S. MICHIGAN AVENUE
SUITE 525
CHICAGO, IL 60604

DALLAS
1701 N COLLINS BLVD, SUITE 130
RICHARDSON, TX 75080
FROM US-75 NORTH TAKE EXIT 26 ONTO N. CENTRAL EXPRESSWAY TOWARD COLLINS BLVD./CAMPBELL RD. TURN LEFT ONTO CAMPBELL RD. TURN LEFT ON COLLINS BLVD. BUILDING IS ON RIGHT.

HOUSTON (NORTHWEST)
9800 NORTHWEST FREEWAY
SUITE 200
HOUEN 77092
FROM HWY 290 DRIVING SOUTHEAST, MERGE ONTO LOOP 610 NORTH. EXIT AT T.C.JESTER AND THEN U-TURN UNDER LOOP 610. STAY ON THE FEEDER ROAD, SHERATON HOTEL IS ON THE RIGHT AS THE ROAD CURVES RIGHT. TURN INTO THE PARKING LOT IMMEDIATELY AFTER THE SHERATON HOTEL AND BEFORE THE OFFICE BUILDING. CENTER IS ON THE 2ND FLOOR.

LAS VEGAS
3210 E TROPICANA AVENUE
LAS VEGAS, NEVADA 89121
FROM I-15 - EXIT EAST ON TROPICANA, TRAVEL APPROXIMATELY 4 MILES, TURN LEFT ON MOJAVE, TURN RIGHT INTO THE PARKING LOT. FROM I-95 - EXIT WEST ON TROPICANA, TRAVEL APPROXIMATELY 1 MILE, TURN RIGHT ON MOJAVE, TURN RIGHT INTO THE PARKING LOT.

MILFORD
500 BIC DRIVE
SUITE 101
MILFORD, CT 06461
FROM HIGHWAY I-95 EXIT 35. GO TOWARD BIC DRIVE. GO 5 MILES TO 500 BIC DRIVE WHICH IS AT GATE 1 OF THE FORMER BIC COMPLEX. GO TO THE REAR OF THE LOT AND PARK. WALK DOWN THE HILL IN FRONT OF THE BUILDING AND ENTER THE FRONT DOOR. SIGNS WILL DIRECT YOU TO SUITE 101 (PSI).

NASHVILLE
THE OAKS
1102 KERMIT DRIVE, SUITE 101
NASHVILLE, TN 37217
FROM I-40 EAST: TAKE EXIT ONTO I-24 (EXIT 213-A). TAKE MURFREESBORO ROAD AT THE FIRST EXIT (EXIT 52). STAY IN THE RIGHT LANE ON THE RAMP, AS THE EXIT APPEARS WHILE YOU ARE STILL IN THE CURVE. ON MURFREESBORO, STAY IN THE LEFT LANE. YOU WILL PASS DAYS INN AND SUPER GIGANTE GROCERY ON YOUR RIGHT. TURN LEFT ONTO KERMIT DRIVE WHEN THERE IS A MCDONALDS ON YOUR RIGHT. PSI IS IN THE FIRST BUILDING ON YOUR LEFT.

FROM I-40 WEST: TAKE EXIT ONTO BRILEY PARKWAY, TURN LEFT ONTO BRILEY PKWY. EXIT ONTO MURFREESBORO RD. STAY IN THE RIGHT LANE. TURN RIGHT ONTO KERMIT DRIVE. PSI IS IN THE FIRST BUILDING ON YOUR LEFT.

OLATHE
18000 W. 105TH ST.
CORPORATE RIDGE OFFICE PARK
OLATHE, KS 66061
FROM EAST - TAKE I-435 W TO K-10/LAWRENCE EXIT 1B. FROM K-10, EXIT AT RIDGEVIEW RD AND TURN LEFT. TAKE FIRST LEFT INTO OFFICE PARK. THE PSI OFFICE IS ON LEFT.

FROM NORTH - TAKE I-35 S TO I-435 W EXIT 222B, THEN TAKE K-10/LAWRENCE EXIT 1B. FROM K-10, EXIT AT RIDGEVIEW RD AND TURN LEFT. TAKE FIRST LEFT INTO OFFICE PARK. THE PSI OFFICE IS ON LEFT.

FROM WEST - TAKE I-35 N TO I-435 W EXIT 222B, THEN TAKE K-10/LAWRENCE EXIT 1B. FROM K-10, EXIT AT RIDGEVIEW RD AND TURN LEFT. TAKE FIRST LEFT INTO OFFICE PARK. THE PSI OFFICE IS ON LEFT.

FROM SOUTH - TAKE I-35 N TO I-435 W EXIT 222B, THEN TAKE K-10/LAWRENCE EXIT 1B. FROM K-10, EXIT AT RIDGEVIEW RD AND TURN LEFT. TAKE FIRST LEFT INTO OFFICE PARK. THE PSI OFFICE IS ON LEFT.

THE PSI OFFICE IS ON LEFT. PLEASE PARK IN THE SPOTS DESIGNATED FOR VISITORS/TESTERS AT THE FRONT OF THE BUILDING.

PHILADELPHIA
ONE BALA AVENUE, SUITE 310
BALA CYNWYD, PA 19004
FROM I-76 EXIT CITY LINE AVENUE. FOLLOW CITY LINE AVENUE SOUTH. THE BUILDING IS ON THE CORNER OF BALA AVENUE AND CITY LINE (NEXT TO THE BALA CYNWYD RAILROAD STATION). THIS IS NOT BALA PLAZA.

RICHMOND
MOOREFIELD VI BUILDING
620 MOOREFIELD PARK DRIVE
SUITE 205
RICHMOND, VA 23236
FROM I-64E, TAKE THE PARHAM RD EXIT AND TURN RIGHT. N PARHAM RD/VA-73 S BECOMES VA-150 S/CHIPPENHAM PKWY. MERGE ONTO VA-76 S/POWHITE PKWY. MERGE ONTO MIDLOTHIAN TURNPIKE WEST. TURN LEFT ON MOOREFIELD PARK DR.

SOUTHFIELD (DETROIT AREA)
2640 LAHSER ROAD, SUITE 150
SOUTHFIELD, MI 48033

FROM I-96 E MERGE ONTO I-696 E. THEN MERGE ONTO MI-10 S. TAKE THE LAHSER ROAD EXIT. KEEP LEFT AT THE FORK IN THE RAMP. TURN LEFT ONTO NORTHWESTERN HWY. TURN RIGHT ONTO LAHSER ROAD. YOU MAY ACCESS THE BUILDING FROM THE BACK USING THE NW DOOR.

SPRINGFIELD
1111 ELM STREET, SUITE 32A
WEST SPRINGFIELD, MA 01089
TAKE MASS PIKE (RT. 90). EXIT 4-WEST SPRINGFIELD/HOLYOKE. TURN RIGHT ON WEST SPRINGFIELD/RT. 5 SOUTH. CONTINUE ON RT. 5 APPROXIMATELY TWO MILES. TURN RIGHT ON ELM ST. - IMMEDIATELY AFTER SHOWCASE CINEMAS, OFFICE IS APPROXIMATELY 1/4 MILE ON THE RIGHT.

TULSA
2840 E. 51ST STREET
BRITTANY SQUARE OFFICE PARK, SUITE 215
TULSA, OK 74105
FROM I-44 EAST - TAKE EXIT NUMBER 228 (HARVARD), STAY TO THE RIGHT WHICH WILL BE WESTBOUND ON 51ST ST. IN ROUGHLY 1/2 MILE, TURN LEFT ON DELAWARE CT. - THE TEST CENTER IS IN THE FIRST BUILDING ON THE LEFT MARKED "BRITTANY SQUARE OFFICE PARK".

FROM I-44 WEST - TAKE EXIT 228 TOWARDS HARVARD AVE. MERGE ONTO E SKELLY DR. USE THE 2ND FROM THE LEFT LANE TO TURN LEFT ONTO S HARVARD AVE. TURN RIGHT ONTO E 51ST ST/EAST 51ST STREET SOUTH. GO ABOUT 1/2 MILE THEN TURN LEFT ONTO DELAWARE CT. - THE TEST CENTER IS IN THE FIRST BUILDING ON THE LEFT MARKED "BRITTANY SQUARE OFFICE PARK".

ONCE INSIDE THE BUILDING, PROCEED TO THE 2ND FLOOR. THE TEST CENTER IS IN SUITE 215.

WEST DES MOINES
1001 OFFICE PARK ROAD, SUITE 315
WEST DES MOINES, IA 50265
FROM I-235, EXIT 8TH ST/73RD ST AND PROCEED SOUTH. TURN RIGHT ON OFFICE PARK ROAD. TURN RIGHT INTO THE DRIVEWAY.

WEST DES MOINES
1001 OFFICE PARK ROAD, SUITE 315
WEST DES MOINES, IA 50265
FROM I-235, EXIT 8TH ST/73RD ST AND PROCEED SOUTH. TURN RIGHT ON OFFICE PARK ROAD. TURN RIGHT INTO THE DRIVEWAY.

WEST HARTFORD
1245 FARMINGTON AVENUE, SUITE 203
WEST HARTFORD CT.
FROM I-84 WEST, TAKE EXIT 40 TOWARD CT-71/NEW BRITAIN AVE/CORBINS CORNER. TURN RIGHT ONTO RIDGEWOOD RD. TURN LEFT ONTO WOOD PONT RD. TURN LEFT ONTO TUNXIS RD. TURN RIGHT ONTO BROOKMOOR RD. TURN RIGHT ONTO BUENA VISTA RD. TURN LEFT ONTO EVERETT AVE. TURN RIGHT ONTO FARMINGTON AVE. DESTINATION IS ON THE RIGHT.

WILSONVILLE
25195 SW PARKWAY AVENUE, SUITE 105
WILSONVILLE, OR 97070

WHEATRIDGE
4891 INDEPENDENCE ST #220
WHEAT RIDGE, CO 80033
FROM I-70W, MERGE ONTO KIPLING ST/CO-391N. TURN RIGHT ONTO W 49TH AVE. TAKE THE 1ST RIGHT ONTO INDEPENDENCE ST.
STATE OF CALIFORNIA
NOTICE OF ELIGIBILITY

You are eligible to participate in the examination for licensure as a California Professional Fiduciary. Your address label contains important date information. In the upper left corner of the address label (above your name) is the date you were determined eligible by the Bureau to take the examination; following that is the date by which you must take your examination. You must pass the examination by the date specified on the label or you will need to reapply to the Bureau.

This bulletin is designed to provide you with information regarding examination procedures. To schedule your examination, please refer to the instructions in this bulletin.