

Lecture Series in

Professional Fiduciary Management

ONLINE

PROFESSIONAL DEVELOPMENT

GET THE IN-DEPTH TRAINING YOU NEED NOW!

Obtaining the proper training is now especially important for professional fiduciaries because of the Professional Fiduciaries Act signed into law in California in 2006.

This lecture series of convenient online classes in professional fiduciary management is designed to meet the continuing education requirements set forth by the California Professional Fiduciaries Bureau for licensed professional fiduciaries. These classes will help you develop a more in-depth understanding in specific areas of practice in professional fiduciary management including: practice management, probate estate administration, management of real property/assets, and care management.



Continuing Education (CE) credit is based upon the number of hours in each class; e.g., 15 hours equals 1.5 continuing education units (CEUs). Individuals who successfully complete all five continuing education classes in this lecture series will be awarded a certificate in Advanced Practice in Professional Fiduciary Management designating 60 hours/6.0 Continuing Education Units (CEUs) were achieved.

ELIGIBILITY

The classes in this lecture series are open to anyone who meets the stated prerequisites for each class. Classes may be taken individually or toward a certificate.

Register today at www.csufextension.org or 657.278.2611

For more information, contact Jennifer Cannon-Gray: 657.278.2761 or jcannon-gray@fullerton.edu

Cal State Fullerton
university extended education
www.csufextension.org

THE CLASSES

PRACTICE MANAGEMENT FOR PROFESSIONAL FIDUCIARIES

(1.5 CEUs/15 hours)

Prerequisite: completion of either certificate in Professional Fiduciary Management or one year of experience as a practicing fiduciary. In this class, participants will review standard operating practices (SOP) in business including basic accounting principles, contract negotiation, conflict/dispute resolution, and available software in support of fiduciary practice management. Class discussions will focus on issues relating to risk management including key elements of insurance coverage, liability, and protection of persons and estates; understanding audits and the bonding process; labor code issues relative to hiring caregivers and worker's compensation; and understanding key components of Social Security and other government agencies.

PROBATE ESTATE ADMINISTRATION: AN OVERVIEW

(0.9 CEUs/9 hours)

Prerequisite: completion of either certificate in Professional Fiduciary Management or one year of experience as a practicing fiduciary. Participants in this class will gain a basic understanding of probate administration through examining how the probate and court system actually functions. An overview of probate process and proceedings will be examined through discussions on the general provisions and procedural nature relating to estate trusts to include powers of attorney, non-probate transfers, administration of estates of decedents and disposition of estates without administration, trust law, and proration of taxes.

MANAGING REAL PROPERTY AND OTHER ASSETS

(1.2 CEUs/12 hours)

Prerequisite: completion of either certificate in Professional Fiduciary Management or one year of experience as a practicing fiduciary. One of the most significant assets that conservators deal with is managing real property. In this class, participants will be introduced to the critical elements in discretionary decision-making relating to the management of real estate and assets of the portfolio through case studies. Discussions will focus on when and how to bring in the experts and identifying the appropriate alternatives available in managing real property and liquid assets.

ISSUES IN CARE MANAGEMENT

(1.5 CEUs/15 hours)

Prerequisite: certificate in Professional Fiduciary Management for Conservators or one year of experience as an appointed conservator. This class reviews the knowledge and skills required of conservators in providing care management to elderly, mentally diminished and disabled clients. Class discussions emphasize the interdisciplinary nature of planning care for older adults, mentally ill and disabled individuals and their families; case studies will be provided to illustrate the range of needs encountered in this specialized care management.

RESOURCES AND PROBLEM SOLVING IN PROFESSIONAL FIDUCIARY MANAGEMENT

(0.9 CEUs/9 hours)

Prerequisite: completion of either certificate in Professional Fiduciary Management or one year of experience as a practicing fiduciary. In this capstone course, individuals review a series of case studies designed to help them synthesize what they have learned in previous classes. Case studies presented in class will allow individuals to work together in developing plans to integrate their own expertise with other professionals. Cases will also include situations that require assessment and decision-making abilities in managing assets and quality of care.

For more information www.csufextension.org or
contact Jennifer Cannon-Gray: 657.278.2761 or jcannon-gray@fullerton.edu