

LAW & FORENSICS

PROFESSIONAL CERTIFICATE IN

# FIDUCIARY MANAGEMENT

ONLINE VIA LIVE WEBCAST



**UCR**

Extension

Professional Studies

# PROFESSIONAL CERTIFICATE IN FIDUCIARY MANAGEMENT

ONLINE VIA  
LIVE WEBCAST

“The coursework balance in my program was perfect and the instructors provided their real-life perspectives, guiding us in learning our discipline, as well as showing us the expectations from the other side. My classmates became invaluable connections in an industry where networking is key.”

—Yvonne Chavez  
Licensed Professional  
Fiduciary  
Chavez-Meinzer  
Fiduciary Services  
Palos Verdes, CA

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## BE THE FIRST LINE OF DEFENSE FOR YOUR CLIENTS

A professional fiduciary is trusted to make important financial decisions for other people. The word “fiduciary” comes from the Latin word “fiduciarius,” relating to something held in trust, and that is the key to being a professional fiduciary--people trust you. They trust you to step in as a third-party representative, an objective professional with their best interests at heart. Some of the duties include managing assets and estates, making decisions about health and welfare, and acting as successor, trustee or conservator. A professional fiduciary must not only be caring and compassionate, but prudent and efficient while operating within legal guidelines. Whether you have an existing fiduciary practice and want to sharpen your skills, or are interested in pursuing this exciting field, this program is for you.

The Professional Fiduciaries Act requires licensing of all professional fiduciaries. You can earn pre-licensing education credit immediately upon completion of 30 hours of approved education courses in this professional certificate. Coursework consists of a balance of concepts, practical knowledge, and real-world fiduciary practices. Offered in an online/live webcast format, lectures and discussions take place via weekly live webcasts; and all coursework, quizzes, exams, and written assignments are completed online.

### WHAT YOU'LL LEARN

- The California court system relative to fiduciaries
- Management of the estates of deceased persons
- Accounting practices required for managing transactions with real estate and personal property assets
- The roles and responsibilities of conservatorships and trust management
- Court requirements and general procedures for trust and probate administration
- Investment strategies and permissible investment vehicles
- Probate court policies and proceedings
- The establishment and operation of a private fiduciary practice

### ALSO OF INTEREST

Minimum Continuing Legal Education (MCLE) credit is provided for all courses. UC Riverside Extension is an approved provider of MCLE credit for attorney, paralegal, and fiduciary management education.

### WHO CAN BENEFIT

- Deputy public guardians or conservators
- CPAs, enrolled agents, financial advisors, or investment advisors
- Adult protective service workers or social workers
- Anyone who would like a career serving as a representative or trustee

### ADMISSION

Take individual courses or fulfill all of the requirements to earn your certificate. Whichever you choose, you will gain the personal power that comes through learning new skills. Be assured that you are receiving education that is backed by the UC tradition of excellence.

### HOW TO EARN THIS CERTIFICATE

Individuals must complete a total of 14 quarter units, with a grade of C or better.

OVERVIEW OF FIDUCIARY MANAGEMENT 2 UNITS

PRACTICAL APPLICATIONS OF ACCOUNTING FOR THE PROFESSIONAL FIDUCIARY 2 UNITS

INTRODUCTION TO CONSERVATORSHIPS OF THE PERSON AND THE ESTATE 2 UNITS

MANAGEMENT OF ESTATE ASSETS 2 UNITS

TRUST ADMINISTRATION AND PROCEDURE 2 UNITS

DECEDENT'S ESTATE PRACTICES AND PROCEDURES 2 UNITS

PROFESSIONAL FIDUCIARY BUSINESS PRACTICES 2 UNITS

- This program can typically be completed within 10-12 months.

### PROGRAM INFORMATION

Prices, requirements and courses are subject to change. For the most up-to-date information:  
Phone: (951) 827-4105  
Email: [prodev@ucx.ucr.edu](mailto:prodev@ucx.ucr.edu)  
Website: [www.extension.ucr.edu](http://www.extension.ucr.edu)

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