UCR University Extension Professional Studies

BE THE FIRST LINE OF DEFENSE

Professional Certificate in Fiduciary Management

WHAT YOU'LL LEARN

- Legal procedures and codes
- Business standards of practice
- Accounting and asset management
- Ethics

TOTAL UNITS 14	TUITION $3,500
COMPLETION TIME 12-15 months	FORMAT Online

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.

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14	12-15 months	Online	$3,500

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BENEFITS OF EARNING A CERTIFICATE

There are several reasons why, Bachelor's degree in hand, you might be considering continuing your studies. An upgraded education section on your resume can open the door to a new career, or, if you're already working, lead to a promotion and a higher salary. While you're working, going back to school is an excellent way to stay current in rapidly changing fields, or, if you've been away from the workforce for a while, to quickly get caught up in the latest trends, concepts, and advances.

While there are as many paths to follow, as there are reasons to follow them when approaching continuing education, there is enormous value in terms of time, financial investment, and personal flexibility while gaining practical training from working professionals in your industry that extends beyond the theory of the classroom and into the real world.

KEY BENEFITS INCLUDE:

- UC quality curriculum
- Professional endorsements
- Schedule flexibility
- Variety of courses and programs
- Instruction from professional leaders in the industry

PAY AS YOU GO

Pay per individual course as you register.

COURSE TUITION RANGE

ALL 2 UNIT COURSES ARE **$500**

Learn more about* ***tuition assistance**.*

CAREER INFORMATION

IN-DEMAND FIELD

Jobs are projected to grow at a rate of 6% over the next 5 years.

STRONG EARNING POTENTIAL

Median Salary **$64,030**

VARIETY OF JOBS TO CHOOSE FROM

- Professional Fiduciary
- Court-Appointed Trustee
- Estate Administrator
- Conservator
- Fiduciary

SKILLS FOR SUCCESS

- Critical Thinking
- Time Management
- Reading Comprehension

REALITY CHECK. WHAT YOU WILL DO ON THE JOB.

- Assist with estate management and administration
- Provide guidance and support to the client and family
- Make financial and/or health decisions in accordance with the client's wishes
- Collaborate with other professionals
- Draft necessary documents and legal plans

Source: ***O*NET Online, Workforce Characteristics Wages and Employment Trends 2022-2032***

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STUDY PLAN

Our certificate programs are designed to be flexible, allowing you the option to take just a few courses or earn the complete certificate. If choosing to complete the certificate, we recommend you get the most out of your experience by following the suggested completion path below.

Required Courses		
QUARTER		UNITS
1	Overview of Fiduciary Management MGT X427.61	2
	Management of Estate Assets MGT X427.64	2
2	Practical Applications of Accounting for the Professional Fiduciary MGT X427.62	2
	Trust Administration and Procedure MGT X427.72	2
3	Introduction to Conservatorships of the Person and Estate MGT X427.63	2
	Decedent's Estate Practices and Procedures MGT X427.71	2
4	Professional Fiduciary Business Practices MGT X427.66	2

ARE YOU READY FOR YOUR NEXT STEP?

Schedule an appointment with an **Advisor** to get started. **extension.ucr.edu/advisors**