



BETTY T. YEE
California State Controller

Notice of Probate Referee Examination

Notice is hereby given that the State Controller's Office will conduct a qualifying examination for possible appointment as Probate Referee on April 29, 2017

The California State Controller is authorized by law to appoint at least one probate referee for each county. Currently, there are 112 appointed probate referees in California. Applicants must meet the minimum professional requirements discussed below, successfully pass an examination and be interviewed by a panel of judges and attorneys. The Controller will make his appointments after considering the recommendations from the interview panel.

Applicants for appointment must possess threshold academic and/or relevant professional experience in order to take the examination and be considered for appointment. Applicants must meet at least one of the following criteria:

- * Bachelor's degree plus at least thirty (30) class hours in appraisal/valuation classes; or
- * 2,000 hours of experience within the last four years appraising real and/or personal property; or
- * Certified as an appraiser by the California Office of Real Estate Appraisers, the Appraisal Institute or the American Society of Appraisers; or
- * Attorney with a minimum of three (3) years as a member of the California State Bar; or
- * Certified Public Accountant with a minimum of three (3) years as a licensed CPA in California

Interested persons who meet the above requirements should e-mail CPS HR Consulting at probateinfo@cpsshr.us or call (916) 263-3624, select option #7, then #5, and request an application for Probate Referee. The application and testing information is also available at www.cpsshr.us or www.sco.ca.gov. Please return completed applications by mail to: CPS HR Consulting, Attn: Probate Referee Program, 241 Lathrop Way, Sacramento, CA 95815. Applications must be received by April 17, 2017. The examination will be given on Saturday, April 29, 2017, in a Northern California and Southern California location.

Please note that five (5) letters of recommendation from the references you list on your application will be required to be considered for an appointment. All letters are to be received by the State Controller's Office no later than May 5, 2017. Send letters to: State Controller's Office, Probate Referee Program, Attn: Amber Camarena, 300 Capitol Mall, Suite 1850, Sacramento, CA 95814.

PROBATE REFEREE

Written Qualifying Examination

EXAMINATION DATE: Saturday, April 29, 2017

FINAL FILING DATE: April 17, 2017 All applications must be received by the final filing date. Applications arriving through the mail after the final filing date will not be accepted for any reason. You may obtain an application by contacting CPS HR Consulting at the address, telephone number or e-mail address listed below, or by visiting www.cpshr.us or www.sco.ca.gov. Applications must be filed by mail with:

CPS HR Consulting
Attn.: Probate Referee Program
241 Lathrop Way
Sacramento, CA 95815
probateinfo@cpshr.us

Telephone: (916) 263-3624, select option #7, then #5
California Relay Service from TDD: 1-800-735-2929

EXAMINATION FEE

An examination fee of \$75.00 (check or money order made payable to the Office of the State Controller) is required of each applicant, and must accompany the application. This fee is not refundable.

DEFINITION

A Probate Referee independently appraises all real estate and tangible and intangible personal property except cash-type items in probate estates; applies probate law to the facts; may hold hearings to obtain the necessary facts and resolve issues of the application of the law to the facts; and other duties as provided by law.

APPOINTMENT

A Probate Referee is appointed to a panel in the county of his or her residence by the State Controller for a term of four (4) years or as otherwise provided by law from a list of persons determined to meet the minimum qualifications.

There are approximately 112 Probate Referee positions on county panels statewide; currently, approximately 30 of these positions will be available for re-appointment. Please note that the law gives the State Controller absolute authority over the establishment of standards of training, performance and ethics for Probate Referees. Appointments are subject to termination for a violation of established standards of training, performance or ethics or for any other reason provided by law.

Prior to appointment, personal interviews and fingerprints will be required. Investigation may be made of experience and personal histories.

LENGTH OF QUALIFICATION

A person who passes the examination is eligible for appointment for a period of five (5) years from the date of examination. Applicants must still successfully complete any additional qualifications required by the appointing Controller, including but not limited to, an interview.

(Continued on Reverse)

COMPENSATION

Probate Referees are not salaried but are remunerated, by law, by fees paid directly by the estate (ordinarily 1/10 of 1% of the appraised value in each case – cash-type items excepted – to a maximum of \$10,000 per estate) from which the referee must pay all expenses (rent, employee salaries, office expenses, etc.).

PROHIBITED PARTISAN POLITICAL ACTIVITIES

A Probate Referee (or any applicant for or person seeking such appointment) shall not, directly or indirectly: (a) solicit, receive, or contribute, or be in any manner concerned in soliciting, receiving or contributing, any assessment, subscription, contribution or political service for any campaign for the Office of the State Controller; or (b) solicit, receive or contribute, or be in any manner concerned in soliciting, receiving or contributing, any assessment, subscription or contribution for any campaign for any other partisan public office of this state exceeding \$200 to any party or any candidate in any one year.

Any person who within the last two (2) years preceding appointment has engaged in any such prohibited activity is not eligible for appointment. Probate Referees must agree to not solicit nor receive political contributions from persons related to the conduct of Probate Referee business.

MINIMUM QUALIFICATIONS

To be appointed as a Probate Referee, a person must by experience, background, training and temperament, be qualified to exercise sound judgment in the determination of fair market values of property of all types, real and personal. **Applicants must possess the education/experience requirements as listed on the application** to be accepted into the written examination. Passing the written examination is also required of those seeking appointment as a Probate Referee.

The written examination will last approximately three (3) hours and will be administered by Cooperative Personnel Services in as many locations statewide as the candidate group justifies. Travel to testing sites will be minimized to the extent possible given the geographical breakdown of those accepted into the written test. Notices will be mailed to those accepted into the written examination prior to the written test indicating where and when to appear for the exam. Reasonable accommodation may be made for unusual circumstances such as religious convictions or physical conditions. A written explanation and request must accompany the application. Candidates may bring non-programmable calculators to the examination.

SCOPE OF WRITTEN EXAMINATION

1. Principles, methods and techniques of appraising real property of all types, including residential, rural, industrial and commercial.
2. Principles, methods and techniques of appraising tangible and intangible personal property of all types, including business, partnerships and closely held corporations.
3. Judgment; analytical and reasoning ability.
4. General understanding of the laws and procedures relating to probate, wills, community and quasi-community property.

See:

http://www.sco.ca.gov/Files-EO/probate_examprep.pdf for additional information.