



**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 Saturday, April 6, 2019**

The California State Controller is authorized by law to appoint at least one probate referee for each county. Currently, there are 107 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](mailto:probateinfo@cpsshr.us) or call (916) 263-3624, select option #4, and request an application for Probate Referee. The application and testing information are also available at [www.cpsshr.us](http://www.cpsshr.us) or [www.sco.ca.gov](http://www.sco.ca.gov). Please return completed application, with exam fee, by mail to: CPS HR Consulting, Attn: Probate Referee Program, 2450 Del Paso Road, Suite 220, Sacramento, CA 95834. Applications must be received by March 25, 2019. The examination will be available to take online on Saturday, April 6, 2019, between the hours of 8:00 a.m. and 5:00 p.m. PST, at a web link to be provided.**

**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 April 12, 2019. 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 6, 2019

**FINAL FILING DATE:** March 25, 2019 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](http://www.cpshr.us) or [www.sco.ca.gov](http://www.sco.ca.gov). Applications must be filed by mail with:

**CPS HR Consulting**  
**Attn: Probate Referee Program**  
**2450 Del Paso Road, Suite 220**  
**Sacramento, CA 95834**  
[probateinfo@cpshr.us](mailto:probateinfo@cpshr.us)  
Telephone: (916) 263-3624, select option #4  
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 107 Probate Referee positions on county panels statewide; currently, approximately 27 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 CPS HR Consulting via online exam through ProctorU. ProctorU is a live online proctoring service that allows you to take your exam from the comfort of your home or office. **In order to use ProctorU, you will need to have a high-speed internet connection, a webcam (internal or external), a windows or apple Operating System, and a government issued photo ID.** ProctorU recommends that you visit the automated equipment check at [www.proctoru.com/testitout](http://www.proctoru.com/testitout) prior to your proctoring session to test your equipment.

Notices will be mailed to those accepted into the written examination prior to the written test and will include information about the online exam and a link to schedule your testing session with ProctorU; you will need to schedule your proctoring session at least 72 hours in advance. Testing must be completed on Saturday, April 6<sup>th</sup>. 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](http://www.sco.ca.gov/Files-EO/probate_examprep.pdf) for additional information. A practice exam is available at <https://www.cpshr.us/exam-registration/probate-referee/practice-exam/>