

# Probate Referee Exam

## Application Instructions

This is a two-step process which will require applicants to send documents to two different offices. If you have any questions regarding completion of the application or examination process, please contact CPS HR Consulting at [probateinfo@cpshr.us](mailto:probateinfo@cpshr.us), or call 916-263-3624 and select option #4.

### Step 1: Complete the Application for Probate Referee

- Include your email. Write your email address on the upper, right corner of the application
- Include a check or money order in the amount of \$75.00 made payable to the Office of the State Controller. This fee is not refundable.
- Applications must be received by CPS HR Consulting no later than August 30<sup>th</sup>, 2024.
- Send completed application and exam fee to CPS HR Consulting at the address below. You may send your application via certified mail or other shipping method that allows for delivery tracking:

**CPS HR Consulting**  
**Attn: Probate Referee Program**  
**2450 Del Paso Road, Suite 160**  
**Sacramento, CA 95834**

### Step 2: Send Five (5) letters of recommendation to the Office of the State Controller.

- References should come from the references you list on your application and are required to be considered for an appointment.
- All letters must be received by the State Controller's Office no later than August 30, 2024.
- Send letters to: State Controller's Office, at the address below:

**State Controller's Office**  
**Attn: Probate Referee Program**  
**300 Capitol Mall, Suite 1850**  
**Sacramento, CA 95814.**

## APPLICATION FOR PROBATE REFEREE

*Please print legibly or type*

*Supplemental information may be attached*

COUNTY OF APPLICATION:

*(List county of residence, followed by all counties of interest)*

<b>1. FULL NAME</b>	<b>Last</b>	<b>First</b>	<b>Middle</b>
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**E-Mail Address:**

<b>2. ADDRESS (Home)</b>	<b>City, State, Zip Code</b>	<b>(County: _____)</b>	<b>Home Phone</b>
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Tel: (    )

<b>Business Address:</b>	<b>City, State, Zip Code</b>	<b>(County: _____)</b>	<b>Business Phone</b>
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Tel: (    )

Fax: (    )

**3. Social Security Number:**    -    -

- |   |                          |     |                          |    |
|---|--------------------------|-----|--------------------------|----|
| 4. Have you taken the Probate Referee exam previously?<br><i>If yes, when? (List most recent exam first)</i>  | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| 5. Do you have a physical condition for which you may need accommodation during the written test? <i>(If yes, see section 15 of this application)</i>                                       | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| 6. Do your religious convictions prevent you from taking an exam on Saturday? <i>(If yes, see section 15 of this application)</i>   | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| 7. Have you ever been convicted by any court of an offense?<br><i>(If yes, see section 15 of this application) (You may omit traffic violations for which the fine was less than \$100)</i> | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| 8. Do you have any physical conditions which may limit your ability to perform, if appointed? <i>(If yes, see section 15 of this application)</i>   | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| 9. Have you ever been discharged or have you ever resigned under pressure or unfavorable circumstances from any employment? <i>(If yes, see section 15 of this application)</i>             | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| 10. Are you a legal citizen of the United States?   | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |
| <i>(If you answered No, do you have the legal right to work in the United States?)</i>  | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No |

### Entrance Requirements

You must possess at least one of the following sets of experience and/or educational patterns to be accepted into the written exam for Probate Referee. Check as many boxes as apply:

- Possession of a Bachelor's Degree in any field plus at least thirty (30) hours in appraisal/valuation classes** *(Please be sure to highlight the details of how you meet this pattern on pages 2 & 3)*
- At least 2,000 hours of experience within the last four years appraising real and/or personal property** *(Please be sure to highlight the details of how you meet this pattern on pages 2 & 3)*
- Certification as an Appraiser by the California Office of Real Estate Appraisers, the Appraisal Institute or the American Society of Appraisers** *(You must fill out section 13 on page 2)*
- Attorney with a minimum of three (3) years as a member of the California State Bar**
- Certified Public Accountant with a minimum of three (3) years as a licensed CPA in California**

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11. REFERENCES Name (No Relatives) Address Phone # Occupation

- 1.
2.
3.
4.
5.

12. EDUCATION High School graduate? Passed high school equivalency? Yes No Yes No

Table with 5 columns: Name and Location of College or University, Course of Study, Completed Units (Semester, Quarter), Degree, Date Completed.

BUSINESS, CORRESPONDENCE, TRADE OR SERVICE SCHOOLS

- 13. Currently valid certificates of professional or vocational competence or licenses (Please indicate license number(s), if any, and expiration date(s)):
14. Membership in professional associations:
15. Explanation of "YES" answers to questions 5, 6, 7, 8 or 9 (please use an attachment if more space is needed):

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16. **EXPERIENCE:** Begin with your most recent work experience. List all experience gained within the last seven (7) years, including U.S. Military service. Detail the duties which apply toward the entrance requirements listed on Page 1 of this application. Experience may be paid or volunteer.

PERIOD OF EMPLOYMENT		JOB TITLE AND MOST IMPORTANT DUTIES PERFORMED	NAME/ADDRESS/PHONE# OF EMPLOYER
FROM	TO		
			<b>Reason for leaving:</b>
			<b>Reason for leaving:</b>
			<b>Reason for leaving:</b>
			<b>Reason for leaving:</b>
			<b>Reason for leaving:</b>

17. **Using an attachment, please list in detail the areas in your background which qualify you to:**

- A. Appraise real estate of all types (residential, rural, commercial, industrial, etc.); leasehold and other interests; oil royalties, etc.
- B. Appraise tangible and intangible real property of all kinds, such as equipment, household and office furnishings, vehicles, antiques, paintings, objects of art, jewelry, securities of all types, businesses, closely-held corporations, partnerships, etc.
- C. Analyze financial statements and prepare consolidated balance sheets.

18. **On the same attachment, please outline your experience and knowledge in each of the following:**

- A. Probate procedure and practice
- B. Community property law

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**Please use an attachment to expand on any of the following questions:**

19. Have you ever acted as an expert witness?  Yes – If yes, please give details  No

20. Have you ever participated in hearings where testimony was taken?  Yes – If yes, please give details  No

21. List PAST public offices, appointive and elective, with dates and where held (List “None” if not applicable):

22. List CURRENT public offices, appointive and elective (List “None” if not applicable):

23. If answer to 22 is other than “None,” would such office either directly or indirectly cause any conflict of interest with that of a Probate Referee?  Yes – If yes, please explain  No

24. Would any of your personal or business activities directly or indirectly preclude you from making certain types of appraisals due to a conflict of interest?  Yes – If yes, please explain  No

25. If you were appointed as a Probate Referee, would you in all cases disqualify yourself if there was any conflict of interest, even though that conflict may be indirect?  Yes  No

**26. CERTIFICATION OF APPLICANT - Read carefully before signing:**

**I HEREBY CERTIFY UNDER PENALTY OF PERJURY under the laws of the State of California that all statements made in this application, including attachments, are complete, true and correct. I agree and understand that any misstatements or omission of material fact will be cause for disqualification and revocation of any appointment as a Probate Referee.**

*Signature* : \_\_\_\_\_

*At* \_\_\_\_\_ *California, on* \_\_\_\_\_ *20* \_\_\_\_\_