

NOTICE

TRAINING REQUIREMENT FOR CUSTOMER(S) FILING PROBATE AND GUARDIANSHIP MATTERS

Non-licensed fiduciaries, typically family members, must receive training in order to be appointed as a guardian, a conservator, or a personal representative.

Specifically, Rule 27.1(A) of the Arizona Rules of Probate Procedure states: **“Any person who is neither a licensed fiduciary under A.R.S. § 14-5651 nor a financial institution shall complete a training program approved by the supreme court before letters to serve as a guardian, conservator, or personal representative are issued....”**

The Administrative Office of the Courts offers online training at no cost. You may select the following training options:

- Ø An introduction to serving as a non-licensed fiduciary;
- Ø Information on serving as a guardian;
- Ø Information on serving as a conservator; and
- Ø Information on serving as a personal representative.

The probate training modules provided by the Administrative Office of the Courts may be found on the Probate resource webpage at <http://www.azcourts.gov/probate/Training.aspx>. From this page you will find a link to the appropriate training module. For example, if you are petitioning to become a guardian, you would choose the “Guardianship” Training Module.

At the end of each training module you will find a printable certificate of completion. **Please print, sign, file a copy with the Clerk of Court and keep a copy for your records.**