

# **2025 Certified Professional Guardian/Conservator Annual Recertification**

## **GENERAL INSTRUCTIONS**

1. Fillable Form – Please Type. If you must hand write, please print clearly with blue or black ink.
2. Please read the instructions for each section. Read and answer each question carefully.
3. Mail complete packets to: **Certified Professional Guardianship/Conservatorship Board  
PO Box 41170  
Olympia, WA 98504-1170**
4. Check or money order must accompany recertification packet.

***Forms that are illegible, incomplete or completed incorrectly will not be accepted.***

<b>Section 1    General Information. Completed <i>only</i> by Individual Certified Professional Guardian/Conservator (CPGC)</b>
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1. This form should be completed by individual CPGCs, **not** CPGC Agencies
2. An annual recertification fee must be paid by every CPGC:
  - \$350 for active CPGCs
  - \$250 for CPGCs working for a CPGC Agency
  - \$250 for CPGCs who qualify for E&O Insurance exemption (see Section 3a for insurance exemption explanation)
  - \$175 for inactive CPGCs.

Name: \_\_\_\_\_ CPGC # \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Section 2    Disclosure GR 23 (e)**  
**Completed by Individual CPGC**

*If the answer is "Yes" to any of the following questions, please provide official documentation.*

Since you last reported:	Yes	No
1. Are you, an individual CPGC, subject to any judgements arising from your performance of Services as a fiduciary?	<input type="checkbox"/>	<input type="checkbox"/>
2. Are you, an individual CPGC, subject to any court findings stating that you violated your fiduciary duties, or have violated federal or any state's consumer protection act, or have violated any other statute proscribing unfair or deceptive acts or practices in the conduct of your business?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you, an individual CPGC, have any felony convictions?	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you, an individual CPGC, have any criminal convictions or are you subject to any court or administrative proceeding findings relevant to the functions assumed as guardian or conservator?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you, an individual CPGC, have any criminal convictions or are you subject to any court or administrative proceeding findings relevant to the functions assumed as a guardian or conservator?	<input type="checkbox"/>	<input type="checkbox"/>
6. Have you, an individual CPGC, been involved in any type of adjudication specified in RCW 43.43.830 and RCW 43.43.842? (Laws restricting access to, and professional licensing with respect to working with, vulnerable adults and children.)	<input type="checkbox"/>	<input type="checkbox"/>
7. Are you, an individual CPGC, subject to any pending licensing or disciplinary actions related to your fiduciary responsibilities or any final licensing or disciplinary board actions resulting in findings of violations?	<input type="checkbox"/>	<input type="checkbox"/>
8. Within the last year have you, an individual CPGC, been or are you currently involved as a debtor in a bankruptcy, insolvency, or receivership proceeding?	<input type="checkbox"/>	<input type="checkbox"/>
9. Have you, an individual CPGC, had a guardianship bond or E&O insurance cancelled?	<input type="checkbox"/>	<input type="checkbox"/>

**Section 3a Errors & Omissions (E & O) Insurance Declaration**  
**Completed by Individual CPGC**

If the answer to EITHER of the following two questions is “No”, you are **REQUIRED** to have Errors & Omissions (E&O) insurance.

Yes No

1. Do you, an individual CPGC, have 25 or fewer guardianship case appointments?

☐ ☐

2. Do you, an individual CPGC, have less than \$500,000 total countable guardianship assets under management?

☐ ☐

**If you answered “Yes” to BOTH questions above, you are exempt from having E&O insurance.**

*Individual CPGCs who are exempt from requirements to have Errors and Omissions (E&O) insurance are permitted to pay lower annual certification renewal fees. To qualify, a CPGC must have 25 or fewer guardianship case appointments at one time, and with less than \$500,000 total countable guardianship assets under management ([CPGC Regulation 704](#)).*

In accordance with [CPGC Regulation 704.8](#), you may request a waiver if you are not exempt.

Yes No

Will you submit a request to waive the requirement for E&O insurance?

☐ ☐

**Section 3b Errors & Omissions (E & O) Insurance Information**  
**Completed by Individual CPGC**

Only those CPGCs that are REQUIRED to carry E&O insurance must complete this section. A copy of the Declaration page from your E&O policy **must be included** with this recertification packet.

Errors & Omissions Insurance Carrier

Insurance Policy #

Coverage Dates: From \_\_\_\_\_ To \_\_\_\_\_

Limit of Insurance Liability

Name of Insurance Agent

Agent's Phone Number

**Section 4 Declaration  
Completed by Individual CPGC**

I declare as a Certified Professional Guardian/Conservator, under penalty of perjury under the laws of the state of Washington that the following is correct (select one that applies):

- ☐ I am covered by the E&O insurance held by a Certified Professional Guardian and Conservator Agency. Name of Agency \_\_\_\_\_
- ☐ I maintain a policy of E&O insurance of at least \$500,000 as required by [CPGC Regulation 704.](#)
- ☐ I qualify for exemption from the requirement to have E&O insurance as set forth in [CPGC Regulation 704.8.](#)
- ☐ I do not qualify for exemption from the requirement to have E&O insurance as set forth in [CPGC Regulation 704.8](#), but I do intend to submit a request to waive the E&O requirement.

**I declare, under penalty of perjury, that all of the information provided in this form is accurate.**

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

Date Signed: \_\_\_\_\_ Place Signed (city/state/zip): \_\_\_\_\_

***IMPORTANT: Packets must be postmarked no later than August 1, 2024.***

***If any part of the packet (form, fee, E&O Declaration or supporting documents) is received after August 1, 2024, the submission is considered late.***

***Packets received with postmarks between August 2 and September 30 will incur a \$150 late fee. A CPGC who has not submitted a recertification packet by **October 1, 2024** may be decertified. ([CPGC Regulation 703.3.1](#))***