

Liberty Fiduciary Services, Inc.

Susan K. Fox, CLPF License #84, NCG

California Licensed Professional Fiduciary

National Certified Guardian

Licensed by the California Department of Consumer Affairs

Bonded and Insured

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sfox@libertyfiduciary.com

www.libertyfiduciary.com

858-361-6031 Cell
858-505-9156 Office
858-505-9158 Fax

EXPERIENCE:

Employment:

June 2011 – present	Founder and President of Liberty Fiduciary Services, Inc.
2002 – June 2011	Founder and President of Susan Joy Fox, Inc.
2004 – Present	dba Liberty Fiduciary Services, San Diego CA
2002 - 2006	dba Senior Social Care Management, San Diego CA
1974 – 2002	Homemaker, raised two children who are college graduates
1968 – 1974	Mamaroneck School District, Mamaroneck, NY Speech Therapist

Volunteer Positions:

2014	San Diego Foundation Professional Advisor Council
2012, 2013	Professional Fiduciary Association of California State Ethics Committee
2012	Professional Fiduciary Association of California Mentoring Committee
2011 – Present	Rady Children’s Hospital Estates & Trusts Council
2009 – 2010	Professional Fiduciary Association of California Member, State Public Relations Committee
2008 – 2012	San Diego Parkinson’s Disease Association Board Member
2004 – Present	San Diego Special Needs Trust Administration Study Group Co-Founder and Group Administrator
2003 – 2010	Rotary Club of La Jolla
2004 – 2009	Senior Services Committee
2005 – 2007	Youth Services Director
2003 – 2006	San Diego Alzheimer’s Association Co-facilitator, Alzheimer’s Support Group Speaker, Speaker’s Bureau

EDUCATION:

Degree: **B.A. Speech Pathology and Correction**
University of Michigan, Ann Arbor

License: **California Licensed Professional Fiduciary #84: 7-1-08**

Certificates: **California Fiduciary**
Professional Fiduciary Association
National Registered Guardian
National Guardianship Association
Counseling & Interpersonal Communication
UCSD Extension
Professional Fiduciary Management for Trustees
Cal State Fullerton
Professional Fiduciary Management for Conservators
Cal State Fullerton
Choice Theory, Reality Therapy
William Glasser Institute, Los Angeles
Gerontological Counseling and Program Management
UCSD Extension
Geriatric Activities Leader
UCSD Extension

Continuing Education Selections from 2006 onward:

Paralegal Program UCSD Extension

Administrative Law, UCSD Extension
Alternative Dispute Resolution, UCSD Extension
Bankruptcy, UCSD Extension
Ethics, UCSD Extension
Wills, Trusts and Estate Administration, UCSD Extension

Continuing Education of the Bar courses (Partial Listing)

Counseling Fiduciaries
Determining Capacity
Estate Accounting
Legal Ethics
Probate Litigation

San Diego County Bar Association courses (partial listing):

10 Traps for the Unwary Special Needs Planner
Elder Abuse Litigation
Ethics in the Age of Electronic Communication

Ethics for Trustees: Advising Your Trustee Client
Professional Fiduciary Act in Action
SSA Consultative Examinations

Professional Fiduciary Association of California courses (partial listing):

Capacity Declaration Issues
Defining and Testing Your Client's Financial Goals
Effective Strategies when Dealing with Challenging Behaviors
Elder Abuse Litigation
Evaluating Cognitive Function and Decisional Capacities
Family Law and Estate Planning Crossover Issues
Fiduciary Duties & Liabilities in Irrevocable Life Insurance Trusts
Safety & Soundness: How to Analyze your Financial Institution
When to Use the Medical Examiner

Related Professional Organization courses (partial listing):

Administering the California Special Needs Trust – Institute for
Fiduciary Studies
37th Annual Trust & Estate Conference, USC Gould School of Law
38th Annual Trust & Estate Conference, USC Gould School of Law
Compassionate Listening, Center for Non Violent Communication
Death and Dying, West Health Care Hospice
Estate Planning, Understanding and Drafting Special Needs Trusts;
Wealth Counsel

CURRENT PROFESSIONAL MEMBERSHIPS:

California Society of Tax Consultants
Estate Planning Council of San Diego
Financial Planning Association of San Diego, Associate Member
National Alliance on Mental Illness
National Association of Professional Geriatric Care Managers
National Guardianship Association
Professional Fiduciary Association of California General Member
San Diego County Bar Association
Probate, Trust and Estate Planning Section: Associate Member