

## 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

7825 Fay Avenue, Suite 200  
La Jolla, CA 92037  
[sfox@libertyfiduciary.com](mailto:sfox@libertyfiduciary.com)

[www.libertyfiduciary.com](http://www.libertyfiduciary.com)

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

### EXPERIENCE:

#### Employment:

June 2011 – present	Founder and President of <b>Liberty Fiduciary Services, Inc.</b>
2002 – June 2011	Founder and President of <b>Susan Joy Fox, Inc.</b>
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	<b>San Diego Foundation</b> Professional Advisor Council
2012, 2013	<b>Professional Fiduciary Association of California</b> State Ethics Committee
2012	<b>Professional Fiduciary Association of California</b> Mentoring Committee
2011 – Present	<b>Rady Children's Hospital</b> Estates & Trusts Council
2009 – 2010	<b>Professional Fiduciary Association of California</b> Member, State Public Relations Committee
2008 – 2012	<b>San Diego Parkinson's Disease Association</b> Board Member
2004 – Present	<b>San Diego Special Needs Trust Administration Study Group</b> Co-Founder and Group Administrator
2003 – 2010	<b>Rotary Club of La Jolla</b>
2004 – 2009	Senior Services Committee
2005 – 2007	Youth Services Director
2003 – 2006	<b>San Diego Alzheimer's Association</b> 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  
37<sup>th</sup> Annual Trust & Estate Conference, USC Gould School of Law  
38<sup>th</sup> 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