



# Probate Examiner

Class Code:  
4895

Bargaining Unit: Unrepresented - Non-management

SUPERIOR COURT OF CALIFORNIA, COUNTY OF ALAMEDA  
Revision Date: Sep 29, 2008

## SALARY RANGE

SEE SALARY SCHEDULE

## JOB DESCRIPTION:

### JOB DEFINITION

Under direction, to review probate files for procedural deficiencies; to advise attorneys of deficiencies; to provide recommendations to Judicial Officer; and to perform other related duties as required.

## EXAMPLES OF DUTIES:

NOTE: The following are duties performed by employees in this classification; however, employees may perform other related duties at an equivalent level. Each individual in the classification does not necessarily perform all listed duties.

1. Reviews probate files that involve calendared and ex parte conservatorship, guardianship, trust and estate matters for procedural and technical deficiencies and necessary court action; and advises attorneys or staff of deficiencies and procedural problems.
2. Analyzes legal documents for technical and procedural accuracy; summarizes petitions and makes recommendations to the Judicial Officer.
3. Reviews and makes recommendations regarding approval of orders that can be granted without court appearance; prepares lists and tapes for pre-granted matters.
4. Clarifies procedural issues and provides information in person and by telephone about probate procedures, calendar and specific cases.
5. Reviews cases with the Judicial Officer; advises of outstanding problems; performs research as requested; and contacts attorneys to advise of Judicial Officer's requirements.

6. Monitors cases during court session; reviews additional documents; and provides recommendation to the Judicial Officer while on the bench.

## MINIMUM QUALIFICATIONS:

### Education and Experience:

(1) A bachelor of arts or bachelor of science degree from an accredited educational institution and a minimum of two years' employment experience with one or more of the following employers:

(A) A court;

(B) A public or private law office; or

(C) A public administrator, public guardian, public conservator, or private professional fiduciary;  
or

(2) A paralegal certificate or an Associate of Arts degree from an accredited educational institution and a minimum of a total of four years' employment experience with one or more of the employers listed in (1); or

(3) A juris doctor degree from an educational institution approved by the American Bar Association or accredited by the Committee of Bar Examiners of the State Bar of California and a minimum of six months' employment experience with an employer listed in (1).

In addition to the above, candidates must meet all of the qualifications of a probate examiner as set forth in rule 10.777 of the California Rules of Court and any other applicable legal authority.

## KNOWLEDGE AND ABILITIES:

**Knowledge of** California Probate Code, other California codes and court rules pertaining to probate matters; court procedures; legal terminology and documents; legal office procedures; correct English usage, punctuation, spelling and grammar; modern office equipment including, computer software programs, technology tools, fax machine and copier.

**Ability to** understand, interpret and apply pertinent provisions of the Probate Code, Civil Code, and other California Codes, Judicial Council and Superior Court rules and procedures including Title 7 of the California Rules of Court; understand complex issues; analyze problems and documents and make appropriate recommendations; communicate effectively, both orally and in writing with Judicial Officers, attorneys, staff and members of the public; use initiative and exercise sound judgment; plan and organize work to meet deadlines; effectively and professionally represent the court in answering questions, responding to inquiries and dealing with concerns from Judicial Officers, court and county staff, vendors and external agencies;

maintain confidentiality of information; and operate modern office equipment including, telephone, computer, printer, copier and fax machine.