

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda - Monday, March 24, 2014

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:00 a.m. – Conference Room 109

General Inquiries Call: (602) 452-3378 (Certification and Licensing Division Line)

Members of the Public May Attend Meeting in Person

For any item listed on the agenda, the Board may vote to go into Executive Session for advice of counsel and/or to discuss records and information exempt by law or rule from public inspection, pursuant to the Arizona Code of Judicial Administration, Code Section 1-202(C).

CALL TO ORDER..... *Mary Carlton, Chair*

1) REVIEW AND APPROVAL OF MEETING MINUTES *Mary Carlton, Chair*

1-A: Review, discussion, and possible action regarding approval of the regular session minutes of the meeting of January 27, 2014.

2) PENDING COMPLAINTS..... *Division Staff*

2-A: Review, discussion and possible action regarding complaint number 09-L028 involving certificate holder David Lerma.

3) INITIAL CERTIFICATION AND ELIGIBILITY *Division Staff*

3-A: Review, discussion and possible action regarding the Honorable William O'Neil's recommendation report involving the denial of certification to Michael Logan.

3-B: Review, discussion and possible action regarding the following application for initial legal document preparer certification:

- 1. Grace Beltran*
- 2. Michael Ivanich*
- 3. Richard Burton*
- 4. Melissa Pullins*
- 5. Stephen Martin*
- 6. Marie Disney*
- 7. Kendall Kallmeyer*
- 8. Patricia Gaynor*
- 9. Cynthia Martinez*
- 10. Guardian Doc Prep, PLLC*
- 11. AZ Legal Choice, LLC*

12. *AZ Legal Docuprep, LLC*
13. *Why Pay Attorney's, LLC*
14. *1 Eighty Labs, Inc., dba Completeness.com*
15. *Preston Parker CPA, LLC*
16. *James L. Bruce Enterprises*
17. *Patricia Flores, LLC*
18. *Detailed Paralegal Service*
19. *Matilde Ortiz*
20. *Rosemary Cook*
21. *Rochelle Wooddell*

3-C: *Review, discussion and possible action regarding the following Business Entity Exemption Requests for the 2013-2015 certification period:*

1. *AZ Legal Docuprep, LLC*
2. *Why Pay Attorney's LLC*

3-D: *Telephonic interview with applicant Jose Sorensen.*

4) **RENEWAL CERTIFICATION APPLICATIONS..... Division Staff**

4-A: *Review, discussion, and possible action regarding the following pending applications for renewal of certification and continuing education compliance:*

1. *Deborah Albert*
2. *Georgiana Aguilar (Willis)*
3. *Lauri Anderson**
4. *Carol Aragon-Montgomery*
5. *Scott Boyer*
6. *Sherrene Caley*
7. *Teri Campbell Nka Adam*
8. *Rhonda Carder*
9. *Beth Cornell*
10. *Diana Crouch**
11. *Roberta Dawson*
12. *Bernadette Deangelis*
13. *Doris Fields*
14. *Richard Fink*
15. *Ramon Garcia*
16. *Richard Getzen*
17. *Joseph Glennon*
18. *Carol Gray*
19. *Minzell Kelly*
20. *Michael Mahoney*
21. *Samantha Philpot Nka Elledge*
22. *Estella Rea*
23. *Mark Vincent*

24. Pamela Wilson*
25. Derek Haigh
26. Barbara French
27. Marni Gramhill
28. Kathryn DeYoung
29. Patricia Flores
30. David Goulet
31. Randolph Albers
32. Kathryn Dicken*
33. Carmen Cercone
34. Amy Richardson*
35. Cynthia Felton
36. Susan Fowler
37. Christopher Hill
38. Katherine Kredit
39. Allen Merrill
40. Arlene Rheinfelder
41. George Mortensen
42. Sylvia Moreno*
43. Laura Atwood
44. Martha Barraza
45. Rebecca Cruz
46. Michael Chan
47. Hyun Kim*
48. Michael Roberson
49. Gloria Villa
50. Mary Marcus*
51. Alejandra McEwen*
52. Claudia Plotnick*
53. Bonnie Ogden*
54. Michael Pierce
55. Deborah Michalowski*
56. Jeannette Heath
57. Mark Lepire
58. Michael Haley*
59. Andrea Winterhof*
60. Chuging Jean-Oase*
61. Wendy Byford*
62. Rebekah Chapman
63. Cynthia Cooks
64. Michelle Feltes
65. Dan Fore
66. Janet Logan*
67. Michael Olsen*
68. Scott Smithson, Jr.*
69. Graciela Herrera
70. Jeanne Kuisle

71. Patricia Morrison
72. Pamela Milburn
73. Dawn Kaiser
74. Matthew Osborn
75. Sumer Jennings
76. James Jennings
77. Carl Cunningham
78. Patricia Garvin
79. Aldo Castaneda
80. Irene Mayer
81. Penny Burley*
82. Judith Alspaugh
83. Fedelyne Bernabe
84. James Bruce
85. Karen Cooley*
86. Debra Griffin
87. Miguel Guzman
88. Karen Nogle
89. Michael Law
90. Richard Hoyt*
91. Carla Gould
92. Dawn Fountain
93. Paris Chacon
94. Jacqueline Velde
95. Mandi Hemming
96. Judith Block
97. Kim Doan-Pickell
98. Scott Gamboa*
99. Alan Ariav
100. Joann Kramer
101. Mary Kortsen
102. Deanna Fore
103. Betty Ulibarri
104. Karen Paschall*
105. Jennifer Cabbie
106. Cassandra Andrick

4-B: *Review, discussion, and possible action regarding pending applications for 2013-2015 certification renewal for business entities.*

1. *Accounting World CPA & Consulting, PLC (Joy Partridge)*
2. *Affordable Document Preparation, LLC (Emil Estopare)*
3. *Arizona Legal Document Services, LLC (Kellie Dicarlo)*
4. *Arizona Professional Documents, LLC (Rochelle Hoekstra)*
5. *Assisted Document Solutions, P.L.L.C. (Kari Kirk)*
6. *AZ Legal Document Solutions, LLC (Michael Mahoney)*
7. *Bishop & Associates (David Bishop)*

8. *Building Industry Credit Association (Andrea Parisi)*
9. *Cautela Corporation (Marley Beard)*
10. *Cheaper Than a Lawyer, LLC (Tracey Kokumo Craig)*
11. *Divorce Packet Processing LLC (Linda Seger)*
12. *Document Preparation Specialists, LLC (Maria Lungo)*
13. *Docuprep Solutions, LLC (Cassandra Wagner)*
14. *Dunn Right Document Services, Inc (Mary Dunn)*
15. *East Valley Estate Planning, LLC (Catharine Longman)*
16. *East Valley Senior Services, LLC (Mark Vincent)*
17. *Eastlack Paralegal Services, LLC (Angela Eastlack)*
18. *Edward F. Daily CPA P.C. (Edward Daily)*
19. *Essential Estate Plans, LLC (Allan Bonhoff)*
20. *Esslinger Enterprises, LLC (Michele Esslinger)*
21. *Family First Estate & Corporate Services, LLC (Eric Schoeller)*
22. *Financial Security Group of Arizona, Inc. (Joann Regan)*
23. *Florence Paralegal Services, LLC (Elizabeth Beatty)*
24. *Four Peaks Planning, Inc. (Jeremy Kahn)*
25. *Grand Canyon Planning Associates LLC (Tracey Dombroski)*
26. *Jurdoc, LLC (Stephen Lee)*
27. *Karla's Paralegal Services, Inc. (Karla Wyrostek)*
28. *Key Legal Document Solutions, PLC (Bernadette Deangelis)*
29. *Lagas & Associates Paralegal Services, LLC (Leanora Lagas)*
30. *Langston-Hancock Legal Documents (Frances Langston-Hancock)*
31. *Legal Document Solutions LLC (Ana Dabbs)*
32. *Legal Matters, LLC (Robyn McCraw)*
33. *Legal Type Documents (Debra Parks)*
34. *Lien Secure, LLC (Donald Lincoln)*
35. *Life Planning Group, LLC (Warner Lewis, III)*
36. *Metro Association Management (Linda Kellogg)*
37. *Montes Multiple Services, LLC (Alicia Celis (Montes)*
38. *My Arizona Paralegal, LLC (Stephanie Villalobos)*
39. *Paradox Document Preparation Service, L.L.C. (Jenifer Bone)*
40. *Paralegal Consultants, Inc (Loray Walker)*
41. *Paralegal in Motion, LLC (Jeannie Collins)*
42. *PDFS, Inc. (Michael Jaimes)*
43. *Peoria Nu Start Bankruptcy (Debra Parks)*
44. *Phoenix Success, Inc. (Marius Cailean)*
45. *Rapid RPS (AZ), LLC (Barry Goldman)*
46. *Rider Levett Bucknall Ltd (Julian Anderson)*
47. *Salmon & Associates Business Consulting, LLC (Phillip Salmon)*
48. *Southwest Legal Document Services, LLC (Ranae Settle)*
49. *Strategic Points Document Preparation, PLLC (Lisa Tonge)*
50. *Strategic Tax Planning LLC (Lynn Forman)*
51. *Suzette M. Brown, PC (Suzette Brown)*
52. *T.F.C. Ventures, Inc. (Lori Kort)*
53. *Tax & Money Strategies (Jack Sides)*
54. *Valley Docs & Paralegal Services, LLC (Mary Carlton)*

4-C: *Review, discussion, and possible action regarding Business Entity Exemption Extension Requests for the 2013-2015 certification period.*

1. *Arizona Professional Documents, LLC (Rochelle Hoekstra)*
2. *AZ Legal Document Solutions, LLC (Michael Mahoney)*
3. *Cautela Corporation (Marley Beard)*
4. *Cheaper Than A Lawyer, LLC (Tracey Kokumo Craig)*
5. *Divorce Packet Processing LLC (Linda Seger)*
6. *Docuprep Solutions, LLC (Cassandra Wagner)*
7. *Dunn Right Document Services, Inc (Mary Dunn)*
8. *East Valley Estate Planning, LLC (Catharine Longman)*
9. *Eastlack Paralegal Services, LLC (Angela Eastlack)*
10. *Edward F. Daily CPA P.C. (Edward Daily)*
11. *Essential Estate Plans, LLC (Allan Bonhoff)*
12. *Family First Estate & Corporate Services, LLC (Eric Schoeller)*
13. *Four Peaks Planning, Inc. (Jeremy Kahn)*
14. *Jurdoc, LLC (Stephen Lee)*
15. *Karla's Paralegal Services, Inc. (Karla Wyrostek)*
16. *Langston-Hancock Legal Documents (Frances Langston-Hancock)*
17. *Legal Matters, LLC (Robyn Mccraw)*
18. *Legal Type Documents (Debra Parks)*
19. *Lien Secure, LLC (Donald Lincoln)*
20. *Metro Association Management (Linda Kellogg)*
21. *My Arizona Paralegal, LLC (Stephanie Villalobos)*
22. *Paradox Document Preparation Service, L.L.C. (Jenifer Bone)*
23. *Paralegal Consultants, Inc (Loray Walker)*
24. *Paralegal In Motion, LLC (Jeannie Collins)*
25. *Peoria Nu Start Bankruptcy (Debra Parks)*
26. *Rapid RPS (AZ), LLC (Barry Goldman)*
27. *Rider Levett Bucknall Ltd (Julian Anderson)*
28. *Salmon & Associates Business Consulting, LLC (Phillip Salmon)*
29. *Southwest Legal Document Services, LLC (Ranae Settle)*
30. *Suzette M. Brown, PC (Suzette Brown)*
31. *Valley Docs & Paralegal Services, LLC (Mary Carlton)*

4-D: *Interview with certificate holder Joy Partridge.*

4-E: *Interview with certificate holder Juan Torres.*

5) CERTIFICATION AND ELIGIBILITYKimberly Siddall

5-A: *Review, discussion, and possible action regarding the Voluntary Surrender request received from the following certificate holders:*

1. *Key Legal Document Solutions, PLC (Bernadette DeAngelis)*
2. *Bernadette DeAngelis*

3. *David Bishop*
4. *Bishop and Associates (David Bishop)*

5-B: *Review, discussion, and possible action regarding the request of the following individuals to retake the Legal Document Preparer Examination:*

1. *Rebecca Bell*
2. *Regan Guthrie*

6) PROPOSED ACJA REVISION.....*Anne Hunter*

6-A: *Review, discussion, and possible action regarding proposed amendment to ACJA § 7-201 to address untimely renewals.*

7) ADMINISTRATIVE ISSUES*Division Staff*

7-A: *Update regarding complaints processed by diversion pursuant to Administrative Order 2012-83.*

CALL TO THE PUBLIC.....*Mary Carlton, Chair*

ADJOURN.....*Mary Carlton, Chair*