

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda – Monday, November 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 September 22, 2014.

2) PENDING COMPLAINTS.....Division Staff

2-A: Review, discussion and possible action regarding the Division Director dismissal of complaint numbers 14-L023/14-L024.

2-B: Review, discussion and possible action regarding complaint number 13-L039, involving certificate holder Silviano Tanori.

2-C: Review, discussion and possible action regarding renewal of individual legal document preparer certification for Calah Thomas; and complaint number 14-L002 involving certificate holder, Calah Thomas.

3) INITIAL CERTIFICATION AND ELIGIBILITYDivision Staff

3-A: Review, discussion and possible action regarding the following applications for initial individual and/or business entity legal document preparer certification:

1. Dynasty Legal Documents, LLC (Melissa Moy)
2. Grace Elmer
3. Michael Aurit
4. Tammy L. Osborne
5. Norman Weld
6. Jarred Greene
7. Julia Navarro

8. Charlotte Gerdes
9. Marretta Mathes
10. K. A. Lindow, CPA, P.C. (Kenneth Lindow)
11. Amerimex Taxes and Immigration Services, LLC (Julia Navarro)
12. Rosemary Razo
13. Meagan McCraw
14. AZ Document Preparation Services, LLC (Elizabeth Clements)
15. Diana Portanova
16. Carmelita White
17. Daniel Pero
18. Peggy Collins
19. Amy West
20. Write Now Document Prep and Legal Services, LLC (Sarah Carino)
21. Judith Sides
22. Diana Guzman De Pizzaty
23. Jessica Lenocho
24. Erika Hanson
25. Ortiz and Associates, LLC (Maria Ortiz)

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

1. Dynasty Legal Documents, LLC (Melissa Moy)
2. AZ Document Preparation Services, LLC (Elizabeth Clements)
3. K.A. Lindow, CPA, P.C. (Kenneth A. Lindow)
4. Write Now Document Prep and Legal Services, LLC (Sarah Carino)
5. Ortiz and Associates, LLC (Maria Ortiz)

3-C: Interview, discussion and possible action regarding the individual application for Donna Trevino.

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

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

1. Janet Summers
2. Richard Rochford

4-B: Interview, review, discussion, and possible action regarding the pending renewal application for Rae MacLean and Arizona Document Services, LLC.

4-C: Review, discussion, and possible action regarding the following pending applications for renewal of certification:

1. Tannya Gaxiola and Sin Abogados, Inc.

5) CERTIFICATION AND ELIGIBILITY

5-A: Review, discussion, and possible action regarding the voluntary surrender of certification received from Estella A. Rea.

5-B: Review, discussion, and possible action regarding Findings of Fact, Conclusions of Law, and Recommendation in pending renewal certification application for Anna Anderson.

6) ADMINISTRATIVE ISSUES.....Division Staff

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

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

ADJOURN.....Mary Carlton, Chair