

# FIDUCIARY BOARD

## Meeting Agenda – Thursday, November 10, 2016

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:30 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

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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).

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**CALL TO ORDER** ..... *Deborah Primock, Chair*

**1) REVIEW AND APPROVAL OF MINUTES**..... *Deborah Primock, Chair*

*1-A: Review, discussion and possible action regarding the regular session minutes of the meeting held on September 8, 2016.*

*1-B: Review, discussion and possible action regarding the executive session minutes of the meeting held on September 8, 2016.*

*1-C: Review, discussion and possible action regarding the regular session minutes of the meeting held on September 23, 2016.*

*1-D: Review, discussion and possible action regarding the executive session minutes of the meeting held on September 23, 2016.*

**2) PENDING COMPLAINTS/RENEWAL OF LICENSURE**..... *Division Staff*

*2-A: Review, discussion and possible actions regarding complaint numbers 15-0013 and 15-0014 involving license holders, Mary Jane Condit and Condit & Associates.*

*2-B: Review, discussion and possible actions regarding complaint number 16-0003:*  
*i. Involving license holder, Philip DeVico; and*  
*ii. Renewal of licensure involving Philip DeVico.*

*2-C: Review, discussion and possible action regarding complaint number 16-0002, involving license holder, Professional Community Services.*

**3) INITIAL LICENSURE AND ELIGIBILITY.....Division Staff**

*3-A: Review, discussion and possible action regarding the following applications for initial individual licensure:*

1. Patrick Moore
2. Shawn Garner
3. Reliance Fiduciary, LLC
4. Margaret Getchell
5. Taryn Hoover

*3-B: Review, discussion and possible action regarding proposed settlement agreement concerning denial of licensure for Matthew Dana.*

**4) RENEWAL OF LICENSURE APPLICATIONS..... Division Staff**

*4-A: Review, discussion and possible action regarding the following applications for renewal of individual licensure:*

1. Lyndi Anderson
2. Denise Baldwin
3. Mary Belasco
4. Janice Bernardini
5. Leigh Bernstein
6. Jeanette Bloss
7. Julianne Brogna
8. Benjamin Burnside
9. Phyllis Cornell
10. Marshall Coyne
11. Thomas Curti
12. Janette Dominguez
13. Frank Escalante
14. Patricia Flores
15. Glenn Gloria
16. Philip Grant
17. Jessica Gregg
18. Linda Hamilton
19. Louise Harter
20. Marshall Herron
21. Alexander Hobson
22. William Howsden
23. Annette Jones
24. Rick Kelley
25. Yolanda Kennedy
26. Carol Kopsco
27. Laurie Kuzdal

- 28. Edward Laber
- 29. Teresa Lancaster
- 30. Gary McGaha
- 31. Debra McKee
- 32. Peggy McMahan
- 33. Debra McPherson
- 34. Jacquelyne Mingle
- 35. Mark Mitchell
- 36. Nancy Mueller
- 37. Mirna Oldham
- 38. Martelle Olsen
- 39. David Osollo
- 40. Sandra Paz
- 41. Ana Perez-Arrieta
- 42. Thomas Peterson III
- 43. Mark Ralles
- 44. Carrie Rednour
- 45. Eileen Rogers
- 46. Elizabeth Rollings
- 47. Mark Rubin
- 48. Peter Santini
- 49. Ranae Settle
- 50. Carol Severyn
- 51. Denice Shepherd
- 52. Jamie Singer
- 53. Rhonda Stone
- 54. Katherine Trojahn
- 55. Peggy Van Norman
- 56. Patricia Weiss
- 57. F.M. Westra
- 58. Craig Winsom
- 59. Henry Wood
- 60. Jessica Zachary
- 61. Lori Lashley

5) LICENSURE AND ELIGIBILITY.....*Division Staff*

5-A: *Review, discussion and possible action regarding request for placement on Active Status from Cathy Simons.*

6) ADMINISTRATIVE ISSUES..... *Division Staff*

CALL TO THE PUBLIC ..... *Deborah Primock, Chair*

ADJOURN ..... *Deborah Primock, Chair*