

# BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda - Monday, November 28, 2011

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

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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 § 1-202(C).

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CALL TO ORDER .....*Les Krambeal, Chair*

1) REVIEW AND APPROVAL OF MEETING MINUTES.....*Les Krambeal, Chair*

1-A: *Review, discussion, and possible action regarding approval of the regular session minutes of the meeting of July 25, 2011.*

1-B: *Review, discussion, and possible action regarding approval of the executive session minutes of the meeting of July 25, 2011.*

1-C: *Review, discussion, and possible action regarding approval of the regular session minutes of the meeting of September 26, 2011.*

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

2-A: *Review, discussion and possible action regarding amendment of the Final Order entered in complaint number 11-L001 involving Julie Star.*

2-B: *Review, discussion and possible action regarding the following certificate holder complaints:*

*Complaint Number 10-L032 – Larry Heywood and Heywood Realty & Investments, Inc.*

*Complaint Number 10-L034 – Karen Lepin and Lepin & Renahan Management, Inc.*

2-C: *Review, discussion and possible action regarding non-certificate holder complaint numbers:*

*NC11-L024 – Kelli Waxman*

*NC09-L017 – Anna Garcia*

*NC11-L007 – INCORP Services, Inc.*

*NC10-L015 – Cecilia Mejia and CC Title Services  
NC08-L075 – My Legal Secretary, LLC  
NC10-L021 – John Sellner  
NC10-L043 – Cheri Streich  
NC11-L041 – Stacy Van Pay  
NC11-L050 – Lupita Diaz*

*2-D: Review, discussion and possible action regarding non-certificate holder complaint number NC11-L004 involving former certified business entity White Mountain Paralegal Service, LLC and previously denied applicant Debra Prue.*

*2-E: Review, discussion and possible action regarding non-certificate holder complaint number NC11-L004 involving previously denied applicant Cicero Cast'On.*

*2-F: Review, discussion and possible action regarding non-certificate holder complaint number NC09-L060 involving Executive Lien & Contractors Services and former certificate holder Marty Grant.*

*2-G: Review, discussion and possible action regarding the following certificate holder complaints:*

*Complaint Number 06-L047 – Bankruptcy and Divorce  
Complaint Number 03-L017 – Tiffany DiGregorio  
Complaint Number 03-L018 – Tiffany DiGregorio  
Complaint Number 03-L033 – Robert Pilkington  
Complaint Number 04-L046 – Robert Pilkington  
Complaint Number 04-L068 – Robert Pilkington  
Complaint Number 04-L063 – Allan Sobol  
Complaint Number 04-L078 – Allan Sobol  
Complaint Number 05-L052 – Allan Sobol  
Complaint Number 05-L001 – Amy Nagel  
Complaint Number 05-L010 – Amy Nagel  
Complaint Number 05-L050 – Amy Nagel*

**3) ADMINISTRATIVE ISSUES .....Division Staff**

*3-A: There are currently no administrative issues for the Board to consider at this time.*

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

4-A: *Review, discussion and possible action regarding the following pending applicants for 2011-2013 certification:*

1. *Bradley J. Barkel*
2. *Spartan Solutions, LLC (Bradley J. Barkel)*
3. *Robin L. Davis*
4. *Rachel B. Wright*
5. *Monica J. Valenzuela*
6. *Kathryn M. Dicken*
7. *Hyun C. Kim*
8. *Gloria Villa*
9. *Deborah Billingsley*
10. *Kimberly A. Gagliardi*
11. *Judith A. Block*
12. *Kathy A. Underwood*
13. *Gerald J. Zukerman*
14. *Susan R. Fowler*
15. *Kathleen C. Yarger*
16. *Eric R. Smith*
17. *Jacquelyn K. Chambers*
18. *Alejandra Mena*
19. *Arizona Professional Documents, LLC (Rochelle Hoekstra)*
20. *North Star Management Group, Inc. (Mark Lepire)*
21. *Sylvia C. Moreno, PC (Sylvia C. Moreno)*
22. *Mohave County Paralegal, LLC (Elizabeth J. Moore)*
23. *Wellth Life, LLC (Carissa Olson)*
24. *Werner von Borries*
25. *Robert A. Edward*
26. *Kimberly E. Sisk*

4-B: *Review of Business Entity Exemption Request for the 2011-2013 initial certification period:*

1. *Spartan Solutions, LLC (Bradley J. Barkel)*
2. *Sylvia C. Moreno, PC (Sylvia Moreno)*
3. *Arizona Professional Documents, LLC (Rochelle Hoekstra)*
4. *North Star Management Group, Inc. (Mark Lepire)*
5. *Mohave County Paralegal, LLC (Elizabeth J. Moore)*

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

5-A: *Interview with and possible action regarding applicant Veronica Rolley.*

5-B: *Review, discussion and possible action regarding Hearing Officer Jonathan Schwartz's Recommendation Report involving the denial of the renewal certification application submitted by Ken Volk.*

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

6-A: *Review, discussion, and possible action regarding the following pending applications for renewal of certification:*

1. *Bernadette Guzman*
2. *Ruby Pino*
3. *Lisa Widman*
4. *Stephen Trezza*
5. *Dawn Polk*

6-B: *Interview with and possible action regarding renewal applications for Barton Stevens and Barton Stevens Special Needs Planning, LLC.*

6-C: *Review of Business Entity Exemption Extension Requests for the 2011-2013 certification period:*

*Barton Stevens Special Needs Planning, LLC*

**CALL TO THE PUBLIC..... Les Krambeal, Chair**

**ADJOURN..... Les Krambeal, Chair**