

FIDUCIARY BOARD

Meeting Agenda – Thursday, September 13, 2012

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

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, Section § 1-202(C).

CALL TO ORDER*Pam Johnston, Chair*

1) REVIEW AND APPROVAL OF MINUTES.....*Pam Johnston, Chair*

1-A: Review, discussion, and possible action regarding the regular session minutes of the meeting held on July 12, 2012.

1-B: Review, discussion, and possible action regarding the executive session minutes of the meeting held on July 12, 2012.

2) PENDING COMPLAINTS.....*Linda Grau*

2-A: Review, discussion and possible action regarding the following complaints dismissed by the Division Director pursuant to Arizona Code of Judicial Administration § 7-201(D)(4)(a) and (H)(2)(a):

Complaint Number NC12-0009

Complaint Number 12-0006

Complaint Number NC11-0012

Complaint Number 11-0013

3) ADMINISTRATIVE ISSUES.....*Anne Hunter*

3-A: Review and discussion regarding the grounds for denial of certification/licensure in Arizona Code of Judicial Administration § 7-201(E)(2)(c) and possible future proposed amendments of the subsection.

4) INITIAL LICENSE APPLICATIONS.....*Kimberly Siddall*

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

1. Amanda Ubiebor
2. Annette Jones
3. Dianne Keethe
4. Helen Jones
5. Shannon Bennett
6. Stephanie Soumis
7. Jewish Family and Children's Services of Arizona (David T. Osollo)

5) LICENSURE AND ELIGIBILITY.....*Kimberly Siddall*

5-A: *Review, discussion, and possible action regarding request for placement on Inactive Status received from licensed fiduciary Gary Strickland, license number 20663.*

6) RENEWAL OF LICENSE APPLICATIONS.....*Kimberly Siddall*

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

1. Bruce Martin
2. Sarah Holcomb
3. Patricia Grenier
4. Shellie Hills
5. Linda Kohl
6. Candy Wheeler-Ruby
7. Mary Espinoza
8. Richard Kruger
9. Lisa Price

CALL TO THE PUBLIC:.....*Pam Johnston, Chair*

ADJOURN:.....*Pam Johnston, Chair*