



# FIDUCIARY BOARD

Arizona State Courts Building  
1501 West Washington Street, Phoenix, Arizona 85007  
Hearing Room 109

**November 17, 2015**

## **Approved Regular Meeting Minutes**

### **MEMBER ATTENDANCE:**

#### **Present:**

Catherine Robbins

#### **Telephonically Present:**

Deborah Primock  
Leonard Montanaro  
Emily Kile  
Gary Krcmarik  
Sherry Reed  
Mark Rubin  
Diana Corry  
Elaine Sweet

#### **Absent:**

Honorable Jay Polk

### **OTHER ATTENDEES:**

#### **AOC Staff:**

Mark Wilson  
Hal White  
Wil Castro  
Debbie MacDougall  
Sheryll Prokop  
Arnita Oliver

#### **Guests:**

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**CALL TO ORDER**

*Called to Order By:* Deborah Primock, Chair

*Time:* 10:32 a.m.

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**1) INITIAL LICENSURE AND ELIGIBILITY**

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

- 1. Custom Care Financial Solutions, LLC (Philip DeVico)**
- 2. Dawn A. Garciak.**
- 3. Christopher Leas**
- 4. Chelsea Dawn Brandes**

**Individual Addressing the Board:** Wil Castro

**Discussion:** It is recommended the Board grant initial fiduciary licensure to Custom Care Financial Solutions, LLC (Philip DeVico).

**Motion:** Move to accept staff's recommendation.

**Motion Proposals:** First Gary Krcmarik  
Second Elaine Sweet  
Recused Deborah Primock

**Motion Results:** Pass

**Individual Addressing the Board:** Wil Castro

**Discussion:** It is recommended the Board grant initial fiduciary licensure to:

Dawn A. Garcia  
Christopher Leas

**Motion:** Move to accept staff's recommendation.

**Motion Proposals:** First Catherine Robbins  
Second Gary Krcmarik

**Motion Results:** Pass

***Individual Addressing the Board:*** Wil Castro

***Discussion:*** It is recommended the Board grant initial fiduciary licensure to Chelsea Dawn Brandes.

***Motion:*** Move to accept staff's recommendation.

***Motion Proposals:*** First Elaine Sweet  
Second Leonard Montanaro  
Recused Catherine Robbins

***Motion Results:*** Pass

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## CALL TO THE PUBLIC

***Individuals Addressing the Board:*** None

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## ADJOURNMENT

***Motion:*** Move to adjourn.

***Motion Proposals:*** First Catherine Robbins  
Second Leonard Montanaro

***Motion Results:*** Pass

***Time:*** 10:40 a.m.

Initials: AO