

FIDUCIARY BOARD

Meeting Agenda – Thursday, July 14, 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

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 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 May 12, 2016.

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

2-A: Review, discussion and possible actions regarding complaint numbers 15-0002 and 15-0003:

- i. Involving license holders Michael Bogle and East Valley Fiduciary Services; and*
- ii. Renewal of licensure involving Michael Bogle*

2-B: Review, discussion and possible action regarding complaint number 15-0007, involving James Otis.

2-C: Review, discussion and possible action regarding complaint number 15-0005, involving Hanna Pisiak-Kusiak.

2-D: Review, discussion and possible action regarding complaint number 15-0012, involving Arizona Department of Veterans' Services.

2-E: Review, discussion and possible action regarding Findings of Fact, Conclusions of Law and Recommendation in complaint number 15-0009, involving Apache County Public Fiduciary.

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

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

1. Jessica Fram
2. Virginia Parry
3. Heidi Harris
4. Jesenia Ortega

3-B: Review, discussion and possible action regarding the following applications for initial business licensure:

1. Freedom Fiduciary
2. Fitzsimmons Fiduciary Services

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

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

1. Marlene Appel
2. Charles Arnold
3. Chelsea Brandes
4. Pamela Braun
5. Becky Brimhall
6. Daniel Bull
7. Joe Cannon
8. Donal Childers
9. Linda Childress
10. James Clark
11. Jason Cobb
12. Roger Coventry
13. Kelly Crane
14. Iris Crawford Bush
15. Elizabeth Crosby
16. Ravie Cundiff
17. Donovan Curley
18. Peggy Dovico
19. Jeanne Drabiak
20. Charles Dyer

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

5-A: *Review, discussion and possible action regarding the request for an extension to complete continuing education requirements from licensee, Judy Nicholson.*

6) **LETTER TO THE BOARD.. ..***Division Staff*

6-A: *Review of letter submitted to Board in response to disposition of Complaint No.09-0007 involving Stephanie McCollum.*

7) **ADMINISTRATIVE ISSUES.....***Division Staff*

7-A: *Review, discussion and possible action regarding the Notice of Formal Statement of Charges for Complaint Numbers 15-0024/15-0025, involving Mario Gonzales and Sierra Huachuca ARC, Inc.*

CALL TO THE PUBLIC*Deborah Primock, Chair*

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