

FIDUCIARY BOARD

Meeting Agenda - Thursday, May 13, 2010

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:30 a.m. - 2:30 p.m. in 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*Kip Anderson, Chair*

1) REVIEW AND APPROVAL OF MINUTES.....*Division Staff*

1-A: Review, discussion, and possible action regarding the Regular Session Minutes of the meeting held on April 8, 2010.

1-B: Review, discussion and possible action regarding the Executive Session Minutes of the meeting held on April 8, 2010.

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

2-A: Review, discussion and possible action regarding complaint number 10-0003 dismissed the Division Director Nancy Swetnam pursuant to Arizona Code of Judicial Administration § 7-201(D)(4)(a) and (H)(2)(a).

2-B: Review, discussion and possible action regarding complaint number 09-0003 involving the Arizona Department of Veterans' Services, Glenn Hall, and Gary Warner.

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

3-A: Review, discussion and possible action regarding proposed legislation.

3-B: Review and discussion regarding the formation and appointment of the Committee on Improving Judicial Oversight and Processing of Probate Court Matters.

4) LICENSE AND ELIGIBILITY.....Division Staff

4-A: *Review, discussion, and possible action regarding Voluntary Surrender request received from licensed fiduciary Nancy Anderson, license number 20381.*

4-B: *Review, discussion, and possible action regarding reactivation of inactive license received from Jo Rittenhouse.*

4-C: *Review, discussion, and possible action regarding Voluntary Surrender request received from the following licensed fiduciaries:*

- 1. Alexander, Nancy
- 2. Bachtel, Linda
- 3. Barnett, Marie
- 4. Dyer, Charles John
- 5. Lee, Barbara
- 6. Long, Vicki
- 7. O’Niel, Dee
- 8. Weissenborn, Donna
- 9. Fiduciaries Services LLC
- 10. Yuma Private Fiduciary, LLC

4-D: *Review, discussion, and possible action regarding Request for Extension to complete continuing education credits and waiver of late application fee received from Diane Levine.*

5) REVIEW OF LICENSE APPLICATIONS.....Division Staff

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

Matthews, Ellen
Phillips, Pamela

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

- 1. Allison-Howard, Donna
- 2. Anderson, Lyndy
- 3. Appel Marlene
- 4. Badilla, Rashara
- 5. Bair, Katherine
- 6. Bair, Warner
- 7. Baumgarten, Maryjane
- 8. Belasco, Mary
- 9. Bensmiller, Pamela
- 10. Bernstein, Leigh

11. Bjorndahl, Brian
12. Bloss, Jeanette
13. Boble, Michael
14. Bouschor, Royal II
15. Bray, Lupe
16. Bull, Daniel
17. Collins, Carole
18. Cooper, Crismon
19. Coyne, Marshall
20. Curti, Thomas
21. Dellisanti, Deborah
22. Dubois, Ronald
23. Dunklin, Donna
24. Dyer, Charles
25. Eadus, John II
26. Edwards, Maureen
27. Elliott, James
28. Elsouhag, Belvet
29. Ficker, Robert
30. Fleming, Robert
31. Foster, Gretchen
32. Fredrickson, Dixie
33. French, Kandace
34. Geisler, Jane Anne
35. Gonzales, Mario
36. Grooms, Linnea
37. Harner, Robert
38. Hartless, Vivian
39. Haviland, Vicki
40. Hawkins, Harold
41. Hoekstra, Rochelle
42. Holcomb, Sarah
43. Ioset, Phillip
44. Janik, Anton
45. Johnston, Pamela
46. Kanaga, Jacqueline
47. Kopsco, Carol
48. Kizak, Kay
49. Kulp, Janice
50. Lawson, Kathleen
51. Liebe, Melissa
52. Lines, Sherrel
53. MacDonald, Eric
54. Manley, Jeffrey
55. Martínez, Mario
56. McDonough, Fenton
57. McMillan, Kate

58. McPerson, Debra
59. Michaelson, Robin
60. Mills, Valerie
61. Mann-Damon, Leslie
62. Osollo, David
63. Paz, Sandra
64. Pimental, Dian
65. Poarch, Tiffany
66. Pope, Gary
67. Price, Lisa
68. Primock, Deborah
69. Reed, Sherry
70. Rittenhouse, Jo
71. Robbins, Catherine
72. Roberts, Mary
73. Rogers, Eileen
74. Rubin, Susan
75. Sabatina, Jeannean
76. Salem, Rashiel
77. Scartezina, Paul
78. Shontz, Marion
79. Short, Laura
80. Singer, Janie
81. Soderquist, Carol
82. Sokol, Sally
83. Stone, Rhonda
84. Tencza, Beverly
85. Tucker, Michael
86. Turley, Norman
87. Van Norman, Peggy
88. Walsma, Pamela
89. Wheeler-Ruby, Candy
90. Winters-Bull, Heather
91. Wood, Henry
92. Muller, Nancy
93. Jones, Carla
94. Bache, Walter L.
95. Walker, Stephanie
96. Liechty, Clint
97. Schamel, Sherri
98. Johnson Claudia
99. Serna, Diana
100. Rayndon, Darra

5-C: *Review, discussion, and possible action regarding the following pending business applications for renewal of licensure:*

1. Care Coordinators (Peggy Van Norman)
2. Crismon Cooper Licensed Fiduciaries, LLC (Crismon Cooper)
3. Fiduciary Solutions, L.L.C. (Mario Martinez)
4. Gila County Public Fiduciary (Tiffany Poarch)
5. Graham County Public Fiduciary (Sherrel Lines)
6. Jewish Family & Children's Services of Southern Arizona (Janie Singer)
7. La Paz County Public Fiduciary (Vivian Hartless)
8. Managed Protective Services Inc. (Jane Anne Geisler)
9. Mohave County Public Fiduciary (Catherine Robbins)
10. Mohave Estate Management Office (Rashiel Salem)
11. Monarch Fiduciaries, LLC (Melissa Liebe)
12. Navajo County Public Fiduciary (Sherry Reed)
13. Northern Arizona Fiduciary Services, PLLC (Sarah Holcomb)
14. Premier Advocacy & Management Services LLC (Pamela Johnson)
15. Sierra Huachuca Arc, Inc (Mario Gonzales)
16. Yuma County Public Fiduciary (Candy Weeler-Ruby)

CALL TO THE PUBLIC*Kip Anderson, Chair*

ADJOURN*Kip Anderson, Chair*