

# FIDUCIARY BOARD

Meeting Agenda - Thursday, September 11, 2008

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:30 a.m. - 1:30 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

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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, Section § 1-202 (C)(5)(b), (c) and (g).

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**CALL TO ORDER** .....*Shari Tomlinson, Chair*

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

*1-A: Discussion, review, and possible approval of the Regular Session Minutes of the meeting held on July 10, 2008.*

*1-B: Discussion, review, and possible approval of the Regular Session Minutes of the meeting held on August 7, 2008.*

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

*2-A: Review discussion, and possible action regarding the following pending complaints:*

*Complaint Number 07-0004: Richard Vanderheiden/Maricopa County Public Fiduciary*

*Complaint Number 07-0029: Candace Bow*

*Complaint Number 08-0001: Candace Bow*

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

*Complaint Number 08-0011*

*Complaint Number 08-0017*

*Complaint Number 08-0018*

*Complaint Number 07-0020*

*Complaint Number 08-0005*

*Complaint Number 07-0025*

*Complaint Number 07-0016*

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

3-A: *Review, discussion, and possible action regarding pending renewal application of Candace Bow.*

3-B: *Review, discussion, and possible action regarding pending renewal application of Clare Guthrie.*

3-C: *Review, discussion, and possible action regarding pending applications for certification.*

*Rosemerrie Christie*

*NRM Resource Management (Rosemerrie Christie)*

3-D: *Review, discussion, and possible action regarding pending applications for 2008-2010 certification renewal.*

*Marie Barnett*

*Fred Appel*

*Donna Benjamin*

*Janice Kulp*

*Coconino County Public Fiduciary (Patricia Powers)*

*D M Benjamin CPA PC (Donna Benjamin)*

*Yuma Private Fiduciary, LLC (Marie Barnett)*

*Professional Community Services, Inc (Audrey Hanks)*

*Fiduciary Services, LLC (Janice Kulp)*

*ARC/Guardianship Services Commission (Martha Brightwell)*

3-E: *Review, discussion, and possible action regarding petition received from Vivian Hartless requesting the Board waive the ACJA § 7-202 subsection (E)(1)(b) requirement and permit Ms. Hartless to sit for the fiduciary certification examination.*

3-F: *Review, discussion, and possible action regarding Inactive Status request received from certified fiduciary JR Rittenhouse, certificate number 20045*

**4) ADMINISTRATIVE ISSUES.....Division Staff**

4-A: *Review, discussion, and possible action regarding proposed amendments to Arizona Code of Judicial Administration § 7-202.*

**CALL TO THE PUBLIC ..... Shari Tomlinson, Chair**

**ADJOURN .....Shari Tomlinson, Chair**