

# FIDUCIARY BOARD

Meeting Agenda - Thursday, April 12, 2007

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 12:00 noon - 4:00 p.m. in Conference Room 119A

General Inquiries Call: (602) 452-3378 (Certification and Licensing Division Line)

Members of the Public May Attend Meeting in Person

(REVISED)

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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) and (c).

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

1) PENDING COMPLAINTS.....*Division Staff*

*1-A: Review of complaints dismissed by Division Director, pursuant to Arizona Code of Judicial Administration § 7-201 (D)(4)(a) and (H)(2)(b):*

*Complaint Number 06-0008*

*Complaint Number 07-0008*

*Complaint Number 07-0009*

*1-B: Review of complaints dismissed by Division Director, pursuant to Arizona Code of Judicial Administration § 7-201 (D)(4)(a) and (H)(2)(b) and complainant request for review submitted pursuant to Arizona Code of Judicial Administration § 7-201 (H)(2)(e):*

*Complaint Number 06-0016*

*1-C: Review, discussion, and possible action regarding the following complaints:*

- *06-0018 – Donna Allison-Howard*
- *06-0003 – Martin O’Dea*
- *06-0011 – Lyndi Anderson*
- *06-0020 – Lance Payette*
- *06-0010 – Gary Warner*
- *06-0009 – Donald Foster*

*1-D: Review, discussion, and possible action regarding inquiry submitted by Robert Adams regarding certified fiduciary use of estate funds for time spent and resources expended in responding to complaints.*

*1-E: Review, discussion, and possible action regarding pending disciplinary action in complaint number 03-0010 involving certificate holders Richard Vanderheiden and the Maricopa County Public Fiduciary Office.*

**2) ADMINISTRATIVE ISSUES.....Shari Tomlinson, Chair**

- 2-A: *Review, discussion, and possible action regarding fiduciary authorities gained through execution of Powers of Attorney.*
- 2-B: *Review, discussion, and approval of Regular and Executive Session Minutes of March 8, 2007.*

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

- 3-A: *Review of pending applications for Standard certification.*

*Clark Leuthold  
Gail M. Christensen  
Dee O'Neill  
Martha Anne Zanetis  
Harvey Van Sciver  
Eileen Rogers  
Beverly Gloden*

- 3-B: *Review, discussion, and possible action regarding petition received from Peter Davis requesting the Board waive the ACJA § 7-202 subsection (E)(1)(b) requirement and permit the Mr. Davis to sit for the fiduciary certification examination.*
- 3-C: *Review, discussion, and possible action regarding petition received from Elizabeth Kizer requesting the Board waive the ACJA § 7-202 subsection (E)(1)(b) requirement and permit the Ms. Kizer to sit for the fiduciary certification examination.*
- 3-D: *Review, discussion, and possible action regarding Voluntary Surrender request of certified fiduciary Lance Payette submitted pursuant to Arizona Code of Judicial Administration § 7-201 (F)(7).*
- 3-E: *Review, discussion, and possible action regarding request received from Lance Putz requesting the Board to waive the ACJA § 7-201 subsection (E)(1)(f)(2)(b)(iv) requirement and permit Mr. Putz to retake the examination.*
- 3-F: *Review, discussion, and possible action regarding Inactive Status request received from certified fiduciary William W. Yeniscavich, certificate number 20577.*

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

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