

## **BOARD OF LEGAL DOCUMENT PREPARERS**

### **Meeting Agenda § Monday, January 26, 2004**

Arizona Supreme Court § 1501 West Washington Street  
Phoenix, Arizona 85007 § 10:00 a.m. - 2:00 p.m. § Conference Room 230  
General Inquiries Call: (602) 364-2378 (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)(5)(b)and (c).**

**CALL TO ORDER .....Judge Steinle, Chair**

**REVIEW AND APPROVAL OF MEETING MINUTES.....Judge Steinle, Chair**

< *Regular and Executive Session Minutes from December 15, 2003.*

**ADMINISTRATIVE ISSUES .....Linda Grau**

< *Informational review of flyers being distributed though the various Self Service Centers regarding the Legal Document Preparer Program.*

< *Review and discussion regarding 2004 Renewal time line.*

< *Discussion regarding Business Entity Exemption Renewal process.*

< *Review and discussion of proposed amendments to the Initial Individual and Initial Business Entity certification applications.*

< *Subcommittee report regarding development of a standardized Request for Hearing Form.*

**CERTIFICATION AND ELIGIBILITY .....Linda Grau**

< *Review of Hearing Officer recommendations regarding Jean Berry and Why Pay A Lawyer?, a Nevada Corporation.*

< *Review of Hearing Officer recommendations regarding Xavier Bustamante Delgado.*

< *Report and recommendations regarding Continuing Education course credit approval.*

**REPORT REGARDING PENDING COMPLAINTS..... Linda Grau**

< *Review and recommendations regarding pending certificate holder complaint numbers 03-L022, 03-L027, 03-L031, 03-L039, 03-L026, 03-L030, and 03-L040.*

< *Subcommittee report regarding request for the Board to petition the Superior Court for a Cease and Desist Order regarding Joseph Estrada, a non-certified individual who is engaging in legal document preparation without certification.*

**REVIEW OF APPLICATIONS ..... Linda Grau**

**HEARING REGARDING DENIAL ..... Linda Grau**

**CALL TO THE PUBLIC .....Judge Steinle, Chair**

**ADJOURN .....Judge Steinle, Chair**

***PENDING APPLICATIONS FOR CERTIFICATION:*** *The following applications for Individual and Business Entity Initial Certification are scheduled to be reviewed on January 26, 2004*

Michael Fisher

Western Estate Services (Michael Fisher)

Jeanette Salmo

Armida Mitchell

Lepin and Renehan Management, Inc. (Karen Lepin)

Celeste Kniefel

Edna Gomez

Lauri-Beth Anderson

Nancy L. Anderson, LLC (Nancy Anderson)

Bruce Davidson

Davidson Financial Services, LLC (Bruce Davidson)

Patricia Lewis

Bishop and Associates, Inc. (David Bishop)

Albers Financial Group, Inc. (Randolf Albers)  
Mark Durnal  
Health Providers Lien Services, Inc. (Mark Durnal)  
Jimmy Taus  
A-Z Legal Document Preparers (Jimmy Taus)  
Suzette Hockensmith  
Robert Hockensmith, PC (Suzette Hockensmith)  
Wilson, Keller and Associates, LLC (Leah Keller)  
Constance Tatham  
Ronald West  
Mary Jo Williams  
Valley Trust and Estate Planning (Mary Jo Williams)  
Richard Fink  
Construction Notice Services, Inc. (Richard Fink)  
Tross Accounting and Tax Services, Inc. (Nina Tross)  
Gerald Zukerman  
Zukerman and Zukerman, PC  
Judy Rossi  
Central Arizona Paralegal Service, Inc. (Robert Pilkington)  
Christian Faith Fellowship Ministry, Inc. (Jeffery Metcalfe)  
Myron Dunn  
Ronald Dunn  
The Patriot Group, Inc. (Ronald Dunn)  
Jane Rossi

### **BUSINESS ENTITY EXEMPTION REQUESTS**

Davidson Financial Services, LLC (Bruce Davidson)  
Bishop and Associates, Inc. (David Bishop)  
Albers Financial Group, Inc. (Randolf Albers)  
Tross Accounting and Tax Services, Inc. (Nina Tross)  
Health Providers Lien Services, Inc. (mark Durnal)  
Central Arizona Paralegal Services, Inc. (Robert Pilkington)

### **HEARINGS REGARDING DENIAL:**

1:30 p.m. Teri Hale