

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda • Monday, January 31, 2005

Arizona Supreme Court • 1501 West Washington Street

Phoenix, Arizona 85007 • 10:00 a.m. - 2:00 p.m. • Conference Room 119A and B

General Inquiries Call: (602) 364-2378 (Certification and Licensing Division Line)

Members of the Public May Attend Meeting in Person

AMENDED

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 6, 2004.*

< *Regular Minutes from December 16, 2004.*

< *Regular and Executive Session Minutes from December 20, 2004.*

ADMINISTRATIVE ISSUES*Linda Grau*

< *Introduction of LDP Program Investigator David Stone.*

< *Update and discussion regarding the status of the pending Petition for Cease and Desist Order related to non-certificate holder Lisa Elwess (aka Lisa Crocker).*

< *Subcommittee report regarding Board roles and responsibilities.*

< *Review and discussion regarding possible future amendments (non-examination related) to Arizona Code of Judicial Administration § 7-208.*

< *Review and discussion of the pending State Bar of Arizona Petition to amend Arizona Supreme Court Rule 31.*

< *Report regarding electronic renewal application process.*

STATUS REPORT REGARDING 2005 EXAMINATION.....Linda Grau

< *Status Update on 2005 LDP examination development process.*

< *Review and discussion of proposed Code revisions (related to the 2005 examination) to Arizona Code of Judicial Administration § 7-208.*

CERTIFICATION AND ELIGIBILITYLinda Grau

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

< *Review of Hearing Officer Michele Iafrate's recommendation regarding the denial of renewal of individual certification for Glen Hadley.*

< *Review of Hearing Officer Patricia Shaler's recommendation regarding the denial of individual certification for Patricia Morgal.*

< *Review of Hearing Officer Craig Tindall's recommendation regarding the denial of renewal of individual certification for Jace Gaston.*

REVIEW OF PENDING COMPLAINTSLinda Grau

< *Review and discussion regarding Hearing Officer Craig Tindall's recommendation report regarding Jace Gaston and LDP Program complaint numbers 03-L007 and 03-L008.*

< *Review and discussion regarding Hearing Officer Daivid Pennartz's recommendation report regarding Rose Quintero and LDP Program complaint number 03-L009.*

< *Review and discussion regarding Hearing Officer Rcihard Goldsmith's recommendation report regarding Allan Sobol and Quick and Legal Paralegal Services and LDP Program complaint numbers 03-L003, 04-L009, and 04-L024.*

< *Review and discussion regarding non-certificate holder cease and desist petition pursuant to Arizona Code of Judicial Administration (H)(1)(c).*

< *Review and discussion regarding Board initiation of LDP Program complaint pursuant to Arizona Code of Judicial Administration § 7-208 (H)(2)(b).*

REVIEW OF CERTIFICATION APPLICATIONS *Linda Grau*

CALL TO THE PUBLIC *Judge Steinle, Chair*

ADJOURN *Judge Steinle, Chair*

PENDING APPLICATIONS FOR INITIAL CERTIFICATION: *The following applications for Individual and Business Entity Certification have been submitted and are requesting review for the 2004-2005 certification period:*

- Michael Anderson
- Financial Strategies, Inc. (Michael Anderson)
- Granite Gavel, LLC (Glen Hadley)
- Roy Warden
- Miranda Buono-Kashou
- Continental Recovery Services (Miranda Buono-Kashou)
- Eric Scott Schoeller
- Miles Fisher
- Deanne Cywinski
- Roadrunner Ridge Enterprises, LLC (Cynthia Wilson)
- Mary Marcus
- Javier Flores
- Lucia Encinas
- Hallie Marr
- Sharon Cooper
- Celia Barotz
- Michael Disney
- Sandra O’Day
- Angela Eastlack
- Debra Pope

BUSINESS ENTITY EXEMPTION REQUESTS: *The following business entities have requested*

Business Entity Exemption for the 2004-2005 certification period:

Financial Strategies, Inc. (Michael Anderson)
Andrew C. Sarager, CPA, PC (Andrew Sarager)
Roadrunner Ridge Enterprises, LLC (Cynthia Wilson)