

# **BOARD OF LEGAL DOCUMENT PREPARERS**

## **Meeting Agenda § Monday, February 28, 2005**

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 (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, 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 January 31, 2005.*

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

*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.*

*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).*

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

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

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

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

*Review and discussion regarding Board of Legal Document Preparers Continuing Education Policy.*

**REVIEW OF PENDING COMPLAINTS ..... Linda Grau**

*Review and discussion regarding certificate holder Lory Toon's request for Consent Agreement in LDP Program complaint number 04-L016.*

*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**

*Review and discussion regarding Business Entity Exemption of the Morrison Group, LLC.*

**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:*

Eric Scott Schoeller  
Miles Fisher  
Roadrunner Ridge Enterprises, LLC (Cynthia Wilson)  
Michael Disney  
Debra Pope  
Edward F. Daily CPA P.C. (Edward Daily)  
Nanette Villafana  
Elaine Anghel

Marwan Sadeddin  
Sylvia Moreno  
Kathleen Kindred  
Debra Casey  
Robert Finn  
Deborah Driesler

**BUSINESS ENTITY EXEMPTION REQUESTS:** *The following business entities have requested Business Entity Exemption for the 2004-2005 certification period:*

Roadrunner Ridge Enterprises, LLC (Cynthia Wilson)  
Edward F. Daily CPA, P.C. (Edward Daily)