

# BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda § Monday, October 25, 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 (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 September 27, 2004.*

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

< *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).*

< *Review and discussion regarding Petition for Cease and Desist pursuant to Arizona Code of Judicial Administration § 7-208 (H)(1)(c).*

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

< *Update regarding examination development process.*

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

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

< *Review and discussion regarding denied renewal applicant DiAnne Wentzloff's request for Consent Agreement.*

- < *Review and discussion regarding denied renewal applicant Dianna Arballo's request for Consent Agreement.*
- < *Review of Hearing Officer Michele Iafrate's recommendation regarding the denial of renewal of initial individual certification to Glen Hadley.*
- < *Review of Hearing Officer Stephen Leshner's recommendation regarding the denial of initial individual certification to Benjamin Freeman.*
- < *Follow-up report regarding status of Board's requests for business entity applications:*

Southwest Resource Management, Inc. – William Kelly AZCLDP# 80218 and  
Minzell Kelly AZCLDP #80111

Legal-Ease, LLC – Dennis Lawrence AZCLDP# 80421

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

- < *Review and discussion regarding Final Order as to AZCLDP Margaret Moreno.*
- < *Review and discussion regarding Board initiation of LDP Program complaint pursuant to Arizona Code of Judicial Administration § 7-208 (H)(2)(b).*
- < *Review of AZCLDP complaint numbers 04-L062.*

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

**REVIEW OF APPLICATIONS FOR 2004 RENEWAL.....*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 Initial Certification have been submitted and are requesting review for the 2004-2005 certification period:*

Leo Blum  
Antonia Bolle  
Katherine Kredit  
Andrew Sarager  
Andrew C. Sarager, CPA, PC (Andrew Sarager)  
The Morrison Group, Inc (Patricia Morrison)  
Brian Liu  
LegalZoom.com Inc (Brian Liu)  
Nancy Weller  
Blanca Zazueta  
Leon Rye  
Granite Gavel, LLC (Glen Hadley)  
Cicero Cast'On  
Glen Duke  
Joseph Glennon  
Eileen Law  
Cynthia Lenzie  
Erna Mortensen  
Charles Rampenthal  
Richard French  
Cecilia Hidalgo  
JoAnn Regan-Dominguez  
Financial Security Group of Arizona, Inc. (JoAnn Regan-Domingez)  
Your Living Trust (Evelyn Baumgardner)  
Kenneth Volk

**PENDING APPLICATIONS FOR RENEWAL OF CERTIFICATION:** *The following applications for Individual and Business Entity Initial Certification have been submitted and were previously deferred renewal:*

Evelyn Baumgardner  
Arizona Wills & Trusts, LLC (Evelyn Baumgardner)  
Cadden Community Management, Inc. (Debra Wild)

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

The Morrison Group, Inc. (Patricia Morrison)