

# BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda - Monday, March 26, 2007

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:00 a.m. - 2.00 p.m. in Conference Room 230

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

Members of the Public May Attend Meeting in Person

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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** .....*Judge Roland Steinle, Chair*

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

*1-A. Regular and Executive Session Minutes for the meeting of January 29, 2007.*

*1-B. Regular Session Minutes for the meeting of February 26, 2007.*

**2) REVIEW OF PENDING COMPLAINTS .....***Division Staff*

*2-A. Review, discussion, and possible action regarding settlement of formal disciplinary action in complaint number 05-L020 involving certificate holder Paul Brown.*

*2-B: Review, discussion, and possible action regarding Consent Agreement for Sandra Coffman involving complaint numbers 04-L011, 04-L069, and 05-L067*

*2-C: Review, discussion, and possible action regarding non-certificate holder complaint involving former certified legal document preparer Petra Lopez.*

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

*Complaint number 07-L010*

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

*3-A. Review of pending requests for continuing education credit approval.*

*3-B: Review, discussion, and possible action regarding proposed Findings of Facts and Conclusions of Law involving Barbara Morejon and Immigration Assistance Center, LLC regarding denial of renewal of certification.*

3-C: *Review, discussion, and possible action regarding the Hearing Officer Richard Goldsmith Recommendation Report regarding the denial of the business entity certification application of American Living Trust Services, LLC (Dennis Lawrence).*

3-D: *Review, discussion, and possible action regarding the request of Kimberly Wagster to waive her continuing education requirements.*

**4) REVIEW OF CERTIFICATION APPLICATIONS ..... Division Staff**

4-A: *Review, discussion, and possible action regarding pending applications for Standard certification.*

4-B: *Interview with and possible action regarding applicant Joanne Ingram.*

4-C: *Review, discussion, and possible action following the February 26, 2007 interview with applicant Gary Moser.*

4-D: *Review, discussion, and possible action regarding Business Entity Exemption Request submitted for applicant Document Preparation Services, LLC (Babara Watson Ledger) and Strategic Points Document Preparation, PLLC (Lisa K. Tonge).*

**5) REVIEW OF ADMINISTRATIVE ISSUES .....Division Staff**

5-A: *Review, discussion, and possible action regarding referrals and compensation.*

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

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

**PENDING APPLICATIONS FOR 2006-2007 STANDARD CERTIFICATION:** *The following applications for Individual and Business Entity Certification have been submitted and will be considered by the Board at this meeting:*

- Strategic Points Document Preparation, PLLC (Lisa K. Tonge)
- John Dawson
- Joanne Ingram
- Gary Moser
- Joan E. Noble