

FIDUCIARY BOARD

Meeting Agenda – January 8, 2026

Arizona Supreme Court -1501 West Washington Street
Phoenix, Arizona 85007 - 10:00 A.M. Conference Room 106/Zoom
General Inquiries Call: 602-452-3378 (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 (under ACJA Sec. 1-202(C)(5)(c)) or for discussion or consideration of records or matters made confidential or privileged by statute, court rule, or the Arizona Code of Judicial Administration (under ACJA Sec. 1-202(C)(5)(b)).

CALL TO ORDER..... *Hon. Jennifer Perkins, Chair*

1) NEW MEMBER WELCOMES..... *Division Staff*

1-A: Introduction of the following new members:

1. Sheryll Prokop was appointed on December 30, 2025, as a Chief Justice Designee member of the Fiduciary Board.
2. Brian Williamson was appointed on December 30, 2025, as a Public Member of the Fiduciary Board.

2) REVIEW AND APPROVAL OF MINUTES.....*Hon. Jennifer Perkins, Chair*

2-A: Review, discussion, and possible action regarding adopting the regular session recording and written minutes of the meeting held on November 13, 2025.

3) PENDING COMPLAINTS*Division Staff*

3-A: Update regarding pending complaints.

3-B: Review, discussion, and possible action regarding Complaint No. 23-0034, involving Linda Kohl.

3-C: Review, discussion and possible action regarding Complaint Nos. 24-0032, 24-0033, 24-0034, and 24-0035 involving Bogutz & Gordon, PC, Teresa Lancaster, Craig Wisnom, and Jacquelyne Mingle.

3-D: Review, discussion and possible action regarding Complaint Nos. 25-0013, 25-0014, and 25-0015 involving Maricopa County Public Fiduciary, Heidi Ernst, Tiffany Covington.

4) PENDING COMPLIANCE AUDITS.....*Division Staff*

4-A: Update regarding pending compliance audits.

5) INITIAL LICENSURE AND ELIGIBILITY.....Division Staff

5-A: Review, discussion, and possible action regarding the following applications for initial individual and/or business licensure:

- 1. Araceli Rodriguez

6) RENEWAL LICENSURE AND APPLICATIONSDivision Staff

6-A: Review, discussion, and possible action regarding the following applications for renewal of individual and/or business entity licensure:

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| 1. Anita Mackowiak | 17. Yuma County Public Fiduciary |
| 2. Benjamin Burnside | 18. Christopher Leas |
| 3. Brett Howard | 19. Claudia Ramirez |
| 4. Carol Severyn | 20. LaToya Jackson |
| 5. Coconino County Public Fiduciary | 21. Rashida Suminski |
| 6. Deborah Dellisanti | 22. Valley Consulting, LLC |
| 7. Dorothy Vallely | 23. Kathryn Blair |
| 8. Fundamentals Fiduciary Group, LLC | 24. Yavapai County Public Fiduciary |
| 9. Heather Fish | 25. Rashiel Salem |
| 10. Jeanne Vatterott-Gale | 26. Mohave Estate Management Office |
| 11. Karin Royle | 27. Carla Jones |
| 12. Karrie Rubke | 28. Northern Arizona Fiduciaries, Inc. |
| 13. Michele Peavy | 29. Fred Appel |
| 14. Nina Alley | 30. Pinal County Public Fiduciary |
| 15. Tina Brooks | 31. Daniel Roberts |
| 16. Valley of the Sun Fiduciary, LLC | 32. Dianne McNamara |
| | 33. Vanessa Nefflen |

7) ADMINISTRATIVE ITEMS.....Division Staff

7-A: Division Updates.

CALL TO THE PUBLIC..... Hon. Jennifer Perkins, Chair

LIMITED RESPONSE TO CALL TO THE PUBLIC..... Hon. Jennifer Perkins, Chair

Individual members of the Board may take one or more of the following actions: (a) respond to criticism made in Public Comment; (b) ask staff to review a matter raised in public comment; or (c) ask that a matter raised in public comment be put on a future agenda. NOTE: Neither the Board as a whole nor Staff are permitted to discuss a matter raised in public comment and the Board is not permitted to vote on a matter raised during an open call to the public unless the matter was otherwise properly noticed on the meeting agenda for discussion and legal action

ADJOURN..... *Hon. Jennifer Perkins, Chair*

Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting the Division at 602-452-3378 or TDD 602-452-3534. A person requesting an accommodation should make the request as early as possible to allow time to arrange the requested accommodation.

Next Meeting:

March 12, 2026 at 10:00 A.M.

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3) PENDING COMPLAINTS

3-A: *Update regarding pending complaints.*

As of December 30, 2025, there are *47 open complaints.

** Complaints are open until a finding of probable cause is entered. The total open complaints represent complaints under investigation.*

FIDUCIARY COMPLAINTS

Age (Months)	Number Cases	Percent
0-5	19	40.4%
6-11	24	51.1%
12-17	0	0.0%
18-22	4	8.5%
23 & over	0	0.0%
Total	47	100%

Previous open complaint chart presented at the November 13, 2025, Board meeting:

Age (Months)	Number Cases	Percent
0-5	26	55.3%
6-11	13	27.7%
12-17	7	14.9%
18-22	1	2.1%
23 & over	0	0.0%
Total	47	100%

FIDUCIARY BOARD

Agenda Summary – January 8, 2026

4) PENDING COMPLIANCE AUDITS

4-A: Update regarding pending compliance audits.

As of December 30, 2025, there are *2 open compliance audits pending completion/final reports*

Random compliance audits: R

Compliance audits related to resolving discipline: D

Other compliance audits (includes follow-ups, Director-approved): O

FIDUCIARY COMPLIANCE AUDIT REPORT

Age (Months)	Number And Type	Percent
0-3	0 (R); (D); 0 (O)	0.0%
4-7	0 (R); (D); 0 (O)	100.0%
8-11	2 (R); 0 (D); 0 (O)	0.0%
12 and over	0 (R); (D); 0 (O)	0.0%
Total	2	100%

**Working papers associated with the compliance audit maintained by Division staff are not public records and are not subject to disclosure. Upon completion of an audit the final report issued to the affected party is a public record subject to public inspection. Final reports that result in corrective action are posted to the program webpage at <https://www.azcourts.gov/cld/Fiduciary-Licensing-Program/Compliance-Audit>.*

Compliance Audit Report: November 13, 2025 Fiduciary Board Meeting

FIDUCIARY COMPLIANCE AUDIT REPORT

Age (Months)	Number And Type	Percent
0-3	0 (R); 0 (D); 0 (O)	0.0%
4-7	1 (R); 0 (D); 0 (O)	100.0%
8-11	1 (R); 0 (D); 0 (O)	0.0%
12 and over	0 (R); (D); 0 (O)	50.0%
Total	2	100%