

FIDUCIARY BOARD

Meeting Agenda – July 9, 2026

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:00 A.M. Conference Room 109/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) OUTGOING MEMBER THANK YOU’S..... *Division Staff*

1-A: Thank you to the following outgoing members:

1. Vinay Singh was a Public Practice Fiduciary member of the Fiduciary Board from April 20, 2023 through June 4, 2026.

2) RECORD OF MEMBER RECUSALS FOR THIS MEETING..... *Division Staff*

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

3-A: Review, discussion, and possible action regarding adopting the regular session recording and written minutes of the meeting held on May 14, 2026.

4) PENDING COMPLAINTS*Division Staff*

4-A: Update regarding pending complaints.

4-B: Review, discussion, and possible action regarding Complaint No. 25-0018 involving license holder, Katherine Trojahn.

4-C: Review, discussion and possible action regarding Complaint Nos. 25-0027 and 25-0028 involving Kuol Awan and Tiffany Covington.

4-D: Review, discussion, and possible action regarding Complaint Nos. 25-0053 and 25-0054 involving license holders, Coventry, Vernon & Roberts, LLC and Roger Coventry.

4-E: Review, discussion, and possible action regarding Complaint Nos. 25-0057, 25-0058, 25-0059, and 25-0060 involving license holders Maricopa County Public Fiduciary; Heidi Ernst; Crystal Painter; and trainee, Kylee Schunn.

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

5-A: Update regarding pending compliance audits.

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

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

1. Shield Fiduciary Services, LLC
2. Lynn Hourani
3. Beatriz Iniguez
4. Anikka Jeffries

7) RENEWAL LICENSURE AND APPLICATIONSDivision Staff

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

1. John Harris

8) LICENSURE AND ELIGIBILITY.....Division Staff

8-A: Review, discussion, and possible action regarding voluntary surrender request received from the following license holders:

1. Amanda Sigmund
2. Sigmund & Co., LLC
3. Roger Coventry

9) ADMINISTRATIVE ITEMS.....Division Staff

9-A: Review, discussion, and possible action regarding updates to Arizona Code of Judicial Administration §7-202.

9-B: 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.

For more details on the roles and responsibilities of the Fiduciary Board and the Fiduciary Licensing Program, please refer to the FAQ located here: [Frequently Asked Questions](#).

Next Meeting:

September 10, at 10:00 A.M.

FIDUCIARY BOARD

Agenda Summary – July 9, 2026

4) PENDING COMPLAINTS

4-A: *Update regarding pending complaints.*

As of June 29, 2026 there are * 51 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	26	51.0%
6-11	11	21.6%
12-17	14	27.4%
18-22	0	0.0%
23 & over	0	0.0%
Total	51	100%

Previous open complaint chart presented at the May 14, 2026, Board meeting:

Age (Months)	Number Cases	Percent
0-5	27	50.0%
6-11	24	44.4%
12-17	3	5.6%
18-22	0	0.0%
23 & over	0	0.0%
Total	54	100%

FIDUCIARY BOARD

Agenda Summary – July 9, 2026

5) PENDING COMPLIANCE AUDITS

5-A: Update regarding pending compliance audits.

As of July 1, 2026 there are *6 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	4 (R); (D); 0 (O)	66.7%
4-7	0 (R); (D); 0 (O)	0.00%
8-11	0 (R); 0 (D); 0 (O)	0.00%
12 and over	2 (R); (D); 0 (O)	33.3%
Total	6	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: May 14 2026 Fiduciary Board Meeting

FIDUCIARY COMPLIANCE AUDIT REPORT

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