

# FIDUCIARY BOARD

## Meeting Agenda – November 13, 2025

Arizona Supreme Court -1501 West Washington Street  
Phoenix, Arizona 85007 - 10:00 A.M. Zoom/Conference Room 109  
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) REVIEW AND APPROVAL OF MINUTES..... *Hon. Jennifer Perkins, Chair***

*1-A: Review, discussion, and possible action regarding adopting the regular session recording and written minutes of the meeting held on September 11, 2025.*

*1-B: Review, discussion, and possible action regarding adopting the executive session recording and written minutes of the meeting held on September 11, 2025.*

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

*2-A: Update regarding pending complaints.*

*2-B: Review, discussion, and possible action regarding Complaint Nos. 23-0007, 23-0008, and 23-0009 involving Coventry, Vernon & Roberts, LLC; Roger Coventry, and Nina Hadzic.*

*2-C: Review, discussion, and possible action regarding Complaint No. 23-0034 involving Linda Kohl.*

*2-D: Review, discussion and possible action regarding Complaint No. 23-0036 involving Dian Pimental.*

*2-E: Review, discussion and possible action regarding Complaint Nos. 25-0005, 25-0006, 25-0007, and 25-0032 involving Maricopa County Public Fiduciary, Heidi Ernst, Susana Chavez, and Ki Son.*

*2-F: Review, discussion and possible action regarding Complaint Nos. 25-0046 and 25-0047 involving Coventry, Vernon & Roberts, LLC, and Roger Coventry.*

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

*3-A: Update regarding pending compliance audits.*

**4) INITIAL LICENSURE AND ELIGIBILITY..... *Division Staff***

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

- 1. Jaclyn Paquette
- 2. Premier Asset Liaison, LLC
- 3. LaToya Sibley
- 4. Leah Geistfeld

**5) RENEWAL LICENSURE AND APPLICATIONS .....Division Staff**

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

- |                                      |                                       |
|--------------------------------------|---------------------------------------|
| 1. Debra Bailey                      | 14. Deborah Holliday                  |
| 2. Jeanette Bloss-Roberts            | 15. Pharyn Leonard                    |
| 3. Ruth Covey                        | 16. Ellen Majure                      |
| 4. Stacy De Lancy-De Leon            | 17. JoAnna McDaniel                   |
| 5. Bridgette Fayaziazad              | 18. Arielle Morales                   |
| 6. Scott Ferris                      | 19. Lindsay Payne                     |
| 7. Jessica Fram                      | 20. Brenda Fay Peterson               |
| 8. Dawn Garcia                       | 21. Elizabeth Posey                   |
| 9. Lina Garcia                       | 22. Lauren Talkington                 |
| 10. Rhonda Garcia                    | 23. Nancy Thornton                    |
| 11. Greenlee County Public Fiduciary | 24. William Williams                  |
| 12. Eric Haley                       | 25. San Pedro Fiduciary Services, LLC |
| 13. Alex Harris                      |                                       |

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

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

- 1. Tatiana Calderon

6-B: *Review, discussion, and possible action regarding request from examinee Josh Noble to retake the fiduciary exam for a fourth time.*

**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:**

**January 9, 2026 at 10:00 A.M.**

# FIDUCIARY BOARD

## Agenda Summary – November 13, 2025

### 2) PENDING COMPLAINTS

2-A: *Update regarding pending complaints.*

As of October 31, 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
<b>0-5</b>	26	55.3%
<b>6-11</b>	13	27.7%
<b>12-17</b>	7	14.9%
<b>18-22</b>	1	2.1%
<b>23 &amp; over</b>	0	0.0%
<b>Total</b>	<b>47</b>	<b>100%</b>

Previous open complaint chart presented at the September 11, 2025, Board meeting:

Age (Months)	Number Cases	Percent
<b>0-5</b>	26	57.8%
<b>6-11</b>	11	24.4%
<b>12-17</b>	4	8.9%
<b>18-22</b>	0	0.0%
<b>23 &amp; over</b>	4	8.9%
<b>Total</b>	<b>45</b>	<b>100%</b>

# FIDUCIARY BOARD

## Agenda Summary – November 13, 2025

### 3) PENDING COMPLIANCE AUDITS

3-A: Update regarding pending compliance audits.

As of October 31, 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
<b>0-3</b>	0 (R); (D); 0 (O)	0.0%
<b>4-7</b>	1 (R); (D); 0 (O)	100.0%
<b>8-11</b>	1 (R); 0 (D); 0 (O)	0.0%
<b>12 and over</b>	0 (R); (D); 0 (O)	0.%
<b>Total</b>	<b>2</b>	<b>100%</b>

*\*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: September 11, 2025 Fiduciary Board Meeting

### FIDUCIARY COMPLIANCE AUDIT REPORT

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