

FIDUCIARY BOARD

Meeting Amended Agenda – May 11, 2023

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:30 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.....*Deborah Primock, Chair*

1) NEW MEMBER WELCOME AND THANK YOU'S..... *Division Staff*

1-A: Introduction of the following new members:

1. Honorable Brian Hauser was appointed on April 26, 2023, as the Chief Justice Designated member of the Fiduciary Board.
2. Jeanette S. Bloss was appointed on April 26, 2023, as a private practice member of the Fiduciary Board.
3. Vinay M. Singh was appointed on April 26, 2023, as a public practice member of the Fiduciary Board.

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

1. Paul D. Friedman was the Chief Justice Designated member of the Fiduciary Board from January 15, 2020, through December 31, 2022.
2. Nicole A. Surran was a public practice member of the Fiduciary Board from August 31, 2022, through April 26, 2023.

2) REVIEW AND APPROVAL OF MINUTES.....*Deborah Primock, Chair*

2-A: Review, discussion, and possible action regarding the regular session minutes of the meeting held on March 9, 2023.

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

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

1. Cami Barnella

4) RENEWAL LICENSURE AND APPLICATIONSDivision Staff

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

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| 1. Maria Alcala | 23. Ralles Law Firm, P.C. |
| 2. Pamela Braun | 24. Claudia Ramirez |
| 3. Becky Brimhall | 25. Carrie Rednour |
| 4. Daniel Bull | 26. Caron Schmierer |
| 5. Coconino County Public Fiduciary | 27. Ranae Settle |
| 6. Deborah Dellisanti | 28. Carol Severyn |
| 7. Charles Dyer | 29. Dawn Shaw |
| 8. Barbara Ficker | 30. Andree Sidwell |
| 9. R. Michael Ficker | 31. Stewardship Association |
| 10. Tamarah Fitzsimmons | 32. Scott Whitney |
| 11. Fitzsimmons Fiduciary Services, LLC | 33. Yuma County Public Fiduciary |
| 12. Geriatric Assessment Management & Solutions, LLC | 34. Deborah Primock |
| 13. Grand Canyon Senior Care, LLC | 35. DSP Fiduciary Services, LLC |
| 14. Stephanie Hollander | 36. Audrey Hanks |
| 15. Deborah Holliday | 37. Cindy Gonzalez |
| 16. Annette Jones | 38. Mark Rubin |
| 17. Arielle Morales | 39. The Families Advocate, LLC |
| 18. Sandra Paz | 40. Southern Arizona Fiduciary Services, LLC |
| 19. Ana Perez Arrieta | 41. Professional Community Services, INC. |
| 20. Brenda Peterson | 42. Stephen Cundiff |
| 21. Pima County Public Fiduciary Office | 43. Jenna Einmo |
| 22. Gary Pope | |

5) PENDING COMPLAINTS.....Division Staff

5-A: Review, discussion, and possible action regarding Complaint No. 22-0088 involving license holder Certified Fiduciary Services Inc.

5-B: Review, discussion, and possible action regarding Complaint No. 21-0010 involving license holder Cochise County Public Fiduciary.

5-C: Review, discussion, and possible action regarding Complaint No. 21-0002 involving license holder Dawn Garcia.

5-D: Review, discussion, and possible action regarding Complaint No. 21-0009 involving license holder Nicole Corona.

5-E: *Review, discussion, and possible action regarding Complaint Nos. 20-0011, 20-0012, 21-0012 involving license holders East Valley Fiduciary Services, Inc., and Michael Bogle.*

5-F: *Update regarding pending complaints.*

CALL TO THE PUBLIC..... *Deborah Primock, Chair*

ADJOURN..... *Deborah Primock, 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.

FIDUCIARY BOARD

Agenda Summary – May 11, 2023

5) PENDING COMPLAINTS

5-F: Update regarding pending complaints.

As of May 5, 2023 there are 40 * open complaints.

** The total known open complaints numbers do not include complaint numbers 20-0011/20-0012/21-0012, 18-0061, 20-0013/20-0014/22-0051/22-0052 with pending Consent Agreements and 21-0009 presented at the previous Board meeting. The total open complaints number represent complaints under investigation.*

FIDUCIARY COMPLAINTS AGE OF PENDING CASELOAD

Age (Months)	Number Cases	Percent
0-4	13	32.5%
5-9	7	17.5%
10-14	7	17.5%
15-19	9	22.5%
20-22	0	0%
23-35	4	10%
36-40	0	0%
Over 40	0	0%
Total	40	100%

Previous complaint chart presented at the March 9, 2023, Board meeting:

Age (Months)	Number Cases	Percent
0-4	10	29.4%
5-9	7	20.6%
10-14	7	20.6%
15-19	5	14.7%
20-22	4	11.8%
23-35	1	2.9%
36-40	0	0%
Over 40	0	0%
Total	34	100%