

FIDUCIARY BOARD

Meeting Agenda – September 8th, 2022

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 and/or to discuss records and information exempt by law or rule from public inspection, pursuant to the Arizona Code of Judicial Administration, Code Section 1-202(C).

CALL TO ORDER.....*Deborah Primock, Chair*

1) NEW MEMBER WELCOME AND THANK YOU’S.....*Deborah Primock, Chair*

1-A: Introduction of the following new members:

1. Zora Manjencich was appointed on August 31, 2022, as an attorney member of the Fiduciary Board.
2. Nicole Surran was appointed on August 31, 2022, as a public practice member of the Fiduciary Board.
3. Kathryn Blair was appointed on August 31, 2022, as a public practice member of the Fiduciary Board.

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

1. Emily Kile was an attorney member of the Fiduciary Board from January 1, 2012, through June 30, 2022.
2. Belvet Elsouhag was a public practice member of the Fiduciary Board from August 7, 2019, through June 30, 2022.

2) EXECUTIVE SESSION:

LEGAL ADVICE ON THE MATTER OF PATRICIA FLORES.....*Division Staff*

3) EXECUTIVE SESSION:

LEGAL ADVICE ON PUBLIC MEETING PROCEDURES.....*Division Staff*

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

4-A: Review, discussion, and possible action regarding the regular session minutes of the meeting held on May 12, 2022.

4-B: Review, discussion, and possible action regarding the executive session minutes of the meeting held on May 12, 2022.

4-C: Review, discussion, and possible action regarding the regular session minutes of the meeting held on June 6, 2022.

4-D: *Review, discussion, and possible action regarding the executive session minutes of the meeting held on June 6, 2022*

5) PENDING COMPLAINTS.....Division Staff

5-A: *Review, discussion, and possible action regarding complaint numbers 21-0003 and 21-0004 involving license holders Carla Jones and Northern Arizona Fiduciaries, Inc. The Division recommends the Board dismiss the complaint numbers 21-0003 and 21-0004.*

5-B: *Update regarding pending complaints.*

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

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

1. The Division recommends that initial fiduciary licensure be granted to Laura Boyack.
2. The Division recommends that initial fiduciary licensure be granted to Justin Cluck.
3. The Division recommends that initial fiduciary licensure be granted to Nina Hadzic.
4. The Division recommends that initial fiduciary licensure be granted to Pharyn Johnson.
5. The Division recommends that initial fiduciary licensure be granted to Patricia Loos.
6. The Division recommends that initial fiduciary licensure be granted to Daniel Roberts.
7. The Division recommends that initial fiduciary licensure be granted to Kallie Knight.
8. The Division recommends that initial fiduciary licensure be granted to Robin O’Connell.
9. The Division recommends that initial fiduciary licensure be granted to Erika Bertoldo.
10. The Division recommends that initial fiduciary licensure be granted to Tiffany Covington.

7) RENEWAL LICENSURE AND APPLICATIONSDivision Staff

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

1. The Division recommends that renewal fiduciary licensure be granted to Harrison Alvarez.
2. The Division recommends that renewal fiduciary licensure be granted to Lyndi Anderson.
3. The Division recommends that renewal fiduciary licensure be granted to Marlene Appel.

4. The Division recommends that renewal fiduciary licensure be granted to Debra Bailey.
5. The Division recommends that renewal fiduciary licensure be granted to Elise Bajohr.
6. The Division recommends that renewal fiduciary licensure be granted to Veronica BenechTemesio.
7. The Division recommends that renewal fiduciary licensure be granted to Kathryn Blair.
8. The Division recommends that renewal fiduciary licensure be granted to Condit and Associates, LLC.
9. The Division recommends that renewal fiduciary licensure be granted to Conservators of Arizona, Inc.
10. The Division recommends that renewal fiduciary licensure be granted to Susan Cooper.
11. The Division recommends that renewal fiduciary licensure be granted to Ravie Cundiff.
12. The Division recommends that renewal fiduciary licensure be granted to Graham County Public Fiduciary.
13. The Division recommends that renewal fiduciary licensure be granted to Raena Honan.
14. The Division recommends that renewal fiduciary licensure be granted to Brett Howard.
15. The Division recommends that renewal fiduciary licensure be granted to Integrated Fiduciary Services, LLC.
16. The Division recommends that renewal fiduciary licensure be granted to Ivaylo Ivanov.
17. The Division recommends that renewal fiduciary licensure be granted to Nicole Jensen.
18. The Division recommends that renewal fiduciary licensure be granted to Darren Joe.
19. The Division recommends that renewal fiduciary licensure be granted to Virginia Jones.
20. The Division recommends that renewal fiduciary licensure be granted to Emily Kile.
21. The Division recommends that renewal fiduciary licensure be granted to Kile Law Firm, PC.
22. The Division recommends that renewal fiduciary licensure be granted to Michael Klecka.
23. The Division recommends that renewal fiduciary licensure be granted to Edward H. Laber.
24. The Division recommends that renewal fiduciary licensure be granted to Edward J. Laber.
25. The Division recommends that renewal fiduciary licensure be granted to Laber & Laber, PLC.
26. The Division recommends that renewal fiduciary licensure be granted to Lori Lashley.

27. The Division recommends that renewal fiduciary licensure be granted to Charles Latherow II.
28. The Division recommends that renewal fiduciary licensure be granted to Kathleen Lawson.
29. The Division recommends that renewal fiduciary licensure be granted to Jennifer Leitch.
30. The Division recommends that renewal fiduciary licensure be granted to Clark Leuthold.
31. The Division recommends that renewal fiduciary licensure be granted to Melissa Liebe.
32. The Division recommends that renewal fiduciary licensure be granted to Gregory Loughridge.
33. The Division recommends that renewal fiduciary licensure be granted to Eric Macdonald.
34. The Division recommends that renewal fiduciary licensure be granted to Anita Mackowiak.
35. The Division recommends that renewal fiduciary licensure be granted to Ellen Majure.
36. The Division recommends that renewal fiduciary licensure be granted to Anna Martelli.
37. The Division recommends that renewal fiduciary licensure be granted to Rhonda Mayo.
38. The Division recommends that renewal fiduciary licensure be granted to Giovanni Maytorena.
39. The Division recommends that renewal fiduciary licensure be granted to Stephanie McCollum.
40. The Division recommends that renewal fiduciary licensure be granted to Cecilia Mejia.
41. The Division recommends that renewal fiduciary licensure be granted to Robin Michaelson.
42. The Division recommends that renewal fiduciary licensure be granted to Valerie Mills.
43. The Division recommends that renewal fiduciary licensure be granted to Jacquelyne Mingle.
44. The Division recommends that renewal fiduciary licensure be granted to Mohave Estate Management Office.
45. The Division recommends that renewal fiduciary licensure be granted to Monarch Fiduciaries, LLC.
46. The Division recommends that renewal fiduciary licensure be granted to Elizabeth Morales.
47. The Division recommends that renewal fiduciary licensure be granted to Nancy Mueller.
48. The Division recommends that renewal fiduciary licensure be granted to Cheri Murray.
49. The Division recommends that renewal fiduciary licensure be granted to Cheri Olivas.

50. The Division recommends that renewal fiduciary licensure be granted to Jesenia Ortega.
51. The Division recommends that renewal fiduciary licensure be granted to River Ruiz.
52. The Division recommends that renewal fiduciary licensure be granted to Santa Cruz Public Fiduciary.
53. The Division recommends that renewal fiduciary licensure be granted to Scottsdale Fiduciary Services, LLC.
54. The Division recommends that renewal fiduciary licensure be granted to Rena Steele.
55. The Division recommends that renewal fiduciary licensure be granted to William Williams.
56. The Division recommends that renewal fiduciary licensure be granted to Julie Willinger.
57. The Division recommends that renewal fiduciary licensure be granted to Craig Wisnom.
58. The Division recommends that renewal fiduciary licensure be granted to Melissa Woodburn.
59. The Division recommends that renewal fiduciary licensure be granted to Kendall Yates.
60. The Division recommends that renewal fiduciary licensure be granted to Tesheena Yazzie.
61. The Division recommends that renewal fiduciary licensure be granted to Eva Yeager.
62. The Division recommends that renewal fiduciary licensure be granted to Rachel Yokley.

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

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

1. The Division recommends the Board accept the request and place Claudia Johnson, license number No. 20528, on inactive status.
2. The Division recommends the Board accept the request and place Sandra A. Paz, license number No. 20504, on inactive status.

9) EXAMINATION AND ELIGIBILITY.....*Division Staff*

9-A: Review, discussion, and possible action regarding request for a third time examination retake for the following examinee Nancy Thornton.

9-B: Review, discussion and possible action regarding request for a fourth time examination retake for the following examinee Jessica DuShane.

10) ADMINISTRATIVE ISSUES.....Division Staff

10-A: Review and discussion regarding updates to Arizona Code of Judicial Administration §7-201.

10-B: Review and discussion regarding Arizona Supreme Court rule petition decisions.

10-C: Information update and discussion regarding mileage reimbursement for in-person Board member attendance.

10-D: Review, discussion, and possible action regarding the establishment of the 2023 Board meeting schedule.

10-E: Information update regarding Division staffing

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

ADJOURN..... Deborah Primock, Chair