

FIDUCIARY BOARD

Amended Meeting Agenda – Thursday, September 8, 2016

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:30 A.M. 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 ORDERDeborah Primock, Chair

1) REVIEW AND APPROVAL OF MINUTES.....Deborah Primock, Chair

1-A: Review, discussion and possible action regarding the regular session minutes of the meeting held on July 14, 2016.

1-B: Review, discussion and possible action regarding the regular session minutes of the meeting held on August 1, 2016.

2) PENDING COMPLAINTS/RENEWAL OF LICENSURE..... Division Staff

2-A: Review, discussion and possible action regarding complaint number 16-0001, involving license holder, James Otis.

2-B: Review, discussion and possible action regarding complaint numbers 15-0017 and 15-0018, involving license holders Care Coordinators, Inc. and Peggy Van Norman.

2-C: Review, discussion and possible action regarding Findings of Fact, Conclusions of Law and Recommendation in complaint number 15-0024, involving Mario Gonzales.

2-D: Review, discussion and possible actions regarding complaint number 15-0025:
i. Involving Sierra Huachuca ARC, Inc.;
and
ii. Request to withdraw renewal application involving Sierra Huachuca ARC, Inc.

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

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

1. Jeanne Vatterott-Gale
2. Mathew Dana
3. Christina Lauro

3-B: Review, discussion and possible action regarding the following application for initial business licensure:

Garcia Fiduciary Group, LLC

4) RENEWAL OF LICENSURE APPLICATIONS..... Division Staff

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

1. Donna Allison-Howard
2. Samuel Anderson
3. Steven Anderson
4. Nicole Arrow
5. Walter Bache
6. John Barkley
7. Pamela Bensmiller
8. Tracy Boen
9. Royal Bouschor II
10. Lori Braddock
11. Chelsea Brandes
12. Raymond Briggs
13. Milly Briggs
14. Antonella Campos
15. Joe Cannon
16. Katrina Chavez
17. Linda Childress
18. James Clark
19. Krista Cline
20. Jason Cobb
21. Carole Collins
22. Crismon Cooper Love
23. Iris Crawford Bush
24. Stephen Cundiff
25. Donovan Curley
26. Peggy Dovico

27. Jeanne Drabiak
28. Lisa Drutz
29. Charles Dyer
30. Ernest Echeverria
31. Belvet Elsouhag
32. Patricia Espinoza
33. Barbara Ficker
34. Robert Ficker
35. Virginia Flores
36. Dawn Garcia
37. Rhonda Garcia
38. Nora Garza
39. Cindy Gonzalez
40. Glenn Hall
41. Robert Harner
42. Vivian Hartless
43. Vicki Haviland
44. Harold Hawkins
45. Natalie Hyde
46. Rochelle Hoekstra
47. Sarah Holcomb
48. Jared Holland
49. Deborah Holliday
50. Raena Honan
51. Anton Janik
52. Claudia Johnson
53. Dianne Keethe
54. Linda Kohl
55. Sabrina Lamb
56. Kathleen Lawson
57. Christopher Leas
58. Clark Leuthold
59. Sherrel Lines
60. John Lloyd III
61. Eric Macdonald
62. Sean McCoy
63. Cecilia Mejia
64. Robin Michaelson
65. Karen Miller
66. Valerie Mills
67. Kathleen Moriarity
68. Rachel Murguia
69. Joseph Noviello
70. Constance Olsen

71. Jeff Ozuna
72. Lew-Ann Perry
73. Pamela Phillips
74. Dian Pimental
75. Hanna Pisiak-Kusiak
76. Tiffany Poarch
77. Deborah Primock
78. Claudia Ramirez
79. Darra Rayndon
80. Eliza Read
81. Sherry Reed
82. Ellen Riddick
83. J.R. Rittenhouse
84. Autumn Rodgers
85. Geraldine Roll
86. Candy Ruby
87. Jeannean Sabatina
88. Nicole Sabatina
89. Mark Sanelli
90. Dawn Savattone
91. Nicole Schwartz
92. Marion Shontz
93. Laura Short
94. Vinay Singh
95. Carol Soderquist
96. Stephanie Soumis
97. Christopher Stubler
98. Jennifer Stupski
99. Rashida Suminski
100. Beverly Tencza
101. Brian Tetrault
102. Carol Ann Thompson
103. Kurt Tittelbach
104. Shari Tomlinson
105. Bradley Torch
106. Michael Tucker
107. Amanda Ubiebor
108. Dorothy Vallely
109. Dawn Walters
110. Theresa Whitfield
111. Scott Whitney
112. Heather Winters Bull
113. Melissa Woodburn
114. Sandra Wyrick

- 115. Tesheena Yazzie
- 116. Roger Landis
- 117. Diane Prescott
- 118. William Willams

4-B: *Review, discussion and possible action regarding renewal of inactive status for the following licensed fiduciaries:*

- 1. Susan Ann Cooper
- 2. Kathryn Munro
- 3. Cathy Simons
- 4. Rena Marie Steele
- 5. Vergel Tan

4-C: *Review, discussion and possible action regarding request to waive CE requirement and renew inactive status for licensed fiduciary, Richard Vanderheiden.*

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

5-A: *Review, discussion and possible action regarding request to withdraw renewal application and/or voluntarily surrender licensure received from licensed fiduciary, Beverly Gloden.*

6) **ADMINISTRATIVE ISSUES..... Division Staff**

6-A: *Review, discussion and possible action regarding the establishment of the 2017 Board meeting schedule.*

CALL TO THE PUBLICDeborah Primock, Chair

ADJOURNDeborah Primock, Chair