

FIDUCIARY BOARD

Meeting Agenda – Thursday, January 13, 2022

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 ORDER.....Deborah 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 November 10, 2021.

1-B: Review, discussion and possible action regarding the executive session minutes of the meeting held on November 10, 2021.

2) PENDING COMPLAINTS.....Division Staff

2-A: Review, discussion and possible action regarding Complaint No. 18-0063 involving license holder Carol Severyn.

2-B: Review, discussion and possible action regarding Complaint No. 19-0005 involving license holder Dawn Walters.

2-C: Review, discussion and possible action regarding Complaint Nos. 19-0001 through 19-0004, 19-0013 through 19-0016, 19-0022 and 19-0023 involving license holders Lisa Price and Entrust Financial Services.

2-D: Update regarding pending complaints.

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

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

1. Toni McBain

2. Amanda Goldstein-Klokov
3. Nicole Jensen
4. Fundamentals Fiduciary Group, L.L.C.

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:

1. Iris Crawford Bush
2. Elite Fiduciary Services, LLC
3. Barbara Ficker
4. Robert Ficker
5. Stewardship Association

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

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

1. Kathleen Moriarity
2. Chelsea Brandes

5-B: Review, discussion, and possible action regarding inactive status request received from license holder Piedad Hogan.

6) ADMINISTRATIVE ISSUES.....Division Staff

6-A: Review, discussion and possible action regarding the certification renewal application deadline pursuant to Arizona Code of Judicial Administration § 7-201(G)(2).

6-B: Review, discussion and possible action concerning random audits of continuing education compliance for renewal.

6-C: Review, discussion and possible action regarding limitation of accepting new appointments pending formal discipline: ACJA 7-202.

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

ADJOURN.....Deborah Primock, Chair