

FIDUCIARY BOARD
Meeting Agenda – Thursday, May 12, 2022

Arizona Supreme Court -1501 West Washington Street
Phoenix, Arizona 85007 - 10:30 A.M. Conference Room 109/Zoom
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) EXECUTIVE SESSION:
LEGAL ADVICE REGARDING MEETING AGENDAS.....Division Staff**

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 10, 2022.

3) PENDING COMPLAINTS.....Division Staff

3-A: Review, discussion, and update regarding Complaint No. 20-0003 involving Patricia Flores.

3-B: Review, discussion, and update 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, Inc.

3-C: Review, discussion, and update regarding Complaint No. 18-0061 involving Diane Prescott.

3-D: Update regarding pending complaints.

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

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

1. Shelley Plumer
2. Paul Willman
3. Zachary Taylor
4. Jessica Gonzalez
5. Norma Contreras
6. Best Interest Fiduciary Services, LLC

5) LICENSURE AND ELIGIBILITYDivision Staff

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

1. Joseph G. Noviello #20232

5-B: Review, discussion, and possible action regarding inactive status request received from license holders:

1. Peter Santini #20199
2. Crystal Cillitto #20793
3. Antonella Campos #20789

6) ADMINISTRATIVE ISSUES.....Division Staff

6-A: Rule Change Petitions and Comments: [R-22-0008](#) and [R-22-0019](#).

6-B: ACJA 7-201: General Requirements. The Division recommends the Board support a proposal to create a contingent approval process.

CALL TO THE PUBLICDeborah Primock, Chair

ADJOURN Deborah Primock, Chair