

FIDUCIARY BOARD

Meeting Agenda – Thursday, May 10, 2012

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, Section § 1-202(C).

CALL TO ORDER*Pam Johnston, Chair*

1) REVIEW AND APPROVAL OF MINUTES.....*Pam Johnston, Chair*

1-A: *Review, discussion, and possible action regarding the Regular Session minutes of the meeting held on January 12, 2012.*

1-B: *Review, discussion, and possible action regarding the Regular Session minutes of the meeting held on March 8, 2012.*

1-C: *Review, discussion, and possible action regarding the Executive Session minutes of the meeting held on March 8, 2012.*

2) PENDING COMPLAINTS.....*Nancy Swetnam*

2-A: *Review, discussion and possible action regarding the following complaint dismissed by the Division Director pursuant to Arizona Code of Judicial Administration § 7-201(D)(4)(a) and (H)(2)(a):*

Complaint Number 11-0005

2-B: *Review, discussion and possible action regarding complaint number 08-0025 involving Jeffery Lake.*

3) ADMINISTRATIVE ISSUES.....*Nancy Swetnam*

3-A: *Update regarding amendments to the Rules of Probate Procedure; Rule 31, Rules of the Supreme Court; the Arizona Codes of Judicial Administration § 7-201 and*

§ 7-202; ACJA Part 3: Superior Court, Chapter 3: Probate Court; Arizona Codes of Judicial Administration § 7-302 and § 7-303; and court investigator training.

3-B: *Review and discussion regarding the grounds for denial of certification/licensure in Arizona Code of Judicial Administration § 7-201(E)(2)(c) and possible future proposed amendments of the subsection.*

4) **INITIAL LICENSE APPLICATIONS.....Kimberly Siddall**

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

1. *Krista Cline*
2. *Mary Warinner*
3. *Peggy McMahon*
4. *Nicole Sabatina*
5. *Hanna Pisiak-Kusiak*
6. *Karen Miller*
7. *Mark Sanelli*
8. *Bonye Barone*

5) **LICENSURE AND ELIGIBILITY.....Kimberly Siddall**

5-A: *Review, discussion, and possible action regarding request for placement on Inactive Status received from licensed fiduciary Susan Rubin, license number 20353.*

5-B: *Review, discussion, and possible action regarding Voluntary Surrender request received from licensed fiduciary Gregory Sulzer, license number 20623.*

6) **RENEWAL OF LICENSE APPLICATIONS.....Kimberly Siddall**

6-A: *Review, discussion, and possible action regarding the following pending applications for renewal of individual licensed fiduciaries:*

1. *Marlene Appel*
2. *Charles Arnold*
3. *Rashara Badilla*
4. *Debra Bailey*
5. *Katherine Bair*
6. *Warner Bair*
7. *Denise Baldwin*
8. *John Barkley*
9. *Lupe Bray*

10. *Julianne Brogna*
11. *Donal Childers*
12. *Carole Collins*
13. *Crismon Cooper*
14. *Phyllis Cornell*
15. *Roger Coventry*
16. *Marshall Coyne*
17. *Iris Crawford Bush*
18. *Thomas Curti*
19. *Connie Dohm*
20. *Patricia Espinoza*
21. *Barbara Ficker*
22. *Robert Ficker*
23. *Robert Fleming*
24. *Rhonda Garcia*
25. *Nora Garza*
26. *Jane Anne Geisler*
27. *Beverly Gloden*
28. *Philip Grant*
29. *Joyce Grudowski*
30. *Robert Harner*
31. *Vivian Hartless*
32. *Vicki Haviland*
33. *H. Rex Hawkins*
34. *Rochelle Hoekstra*
35. *Raena Honan*
36. *Phillip Ioset*
37. *Carol Kopsco*
38. *Janice Kulp*
39. *Sabrina Lamb*
40. *Roger Landis*
41. *Lori Lashley*
42. *Kathleen Lawson*
43. *Clinton Liechty*
44. *Sherrel Lines*
45. *John Lloyd Iii*
46. *Sean Mccoy*
47. *Debra Mcpherson*
48. *Joseph Noviello*
49. *Constance Olsen*
50. *Dian Pimental*
51. *Diane Prescott*
52. *Estella Rea*
53. *Carrie Rednour*
54. *Sherry Reed*
55. *Mary Roberts*
56. *Rashiel Salem*

57. Dawn Savattona
58. Paul Scartezina
59. Clarence Scott
60. Vicki Shepard
61. Marion Shontz
62. Sally Simpson
63. Sally Sokol
64. Rena Steele
65. Rhonda Stone
66. Kurt Tittelbach
67. Michael Tucker
68. Norman Turley
69. Dorothy Vallely
70. Susan Villarreal
71. Stephanie Walker
72. Pamela Walsma
73. Dawn Walters
74. Harry Wilke
75. William Williams
76. Henry Wood
77. Catherine Yoshida-Corella
78. Jane Berg
79. James Elliott
80. Michael Bogle
81. Belvet Elsouhag
82. Frank Ciotczyk
83. Elizabeth Crosby
84. Deborah Dellisanti
85. Lyndi Anderson
86. Brian Bjorndahl
87. Pamela Braun
88. Mary Belasco
89. Walter Bache
90. Benjamin Burnside
91. Milly Briggs
92. Raymond Briggs
93. John Eadus, II
94. Maureen Edwards
95. Maryjane Baumgarten
96. Royal Bouschor, II
97. Frederick Brinckerhoff
98. Mary Jane Condit
99. Charles Dyer
100. Denice Shepherd
101. Mario Martinez
102. Beverly Tencza
103. Frances Lara

104. *Claudia Johnson*
105. *James Otis*
106. *Eileen Rogers*
107. *Gary Strickland*
108. *Tamarah Fitzsimmons*
109. *Jeannean Sabatina*
110. *Diana Serna*
111. *Candy Wheeler-Ruby*

6-B: *Review, discussion, and possible action regarding the following pending business applications for renewal of licensure:*

1. *Crismon Cooper Licensed Fiduciaries LLC (Crismon J Cooper)*
2. *Managed Protective Services Inc. (Jane Anne Geisler)*
3. *Fleming & Curti, PLC (Robert B Fleming)*
4. *Gila County Public Fiduciary (Tiffany Poarch)*
5. *Mohave Estate Management Office (Rashiel J Salem)*
6. *Navajo County Public Fiduciary (Sherry L Reed)*
7. *Graham County Public Fiduciary (Sherrel Lines)*
8. *Stewardship Association (Barbara J Ficker)*
9. *Cochise County Public Fiduciary (Vicki L Haviland)*
10. *Greenlee County Public Fiduciary (Nora Garza)*
11. *Vallely Consulting, LLC (Dorothy E. Vallely)*
12. *Assurance Fiduciary & Financial Svcs PLL (Sarah J Holcomb)*
13. *La Paz County Public Fiduciary (Vivian Hartless)*
14. *Professional Community Services, Inc. (Audrey A Hanks)*
15. *Condit and Associates, LLC (Mary Jane Condit)*
16. *Fiduciary Solutions, LLC (Mario S Martinez)*
17. *Care Coordinators (Peggy S Van Norman)*
18. *Southwest Fiduciary, Inc. (Gregory P Dovico)*
19. *Statewide Community Services, LLC (Peggy A Dovico)*
20. *Geriatric Assesmnt Mngmt&Solutions, LLC (Pamela J Braun)*
21. *Monarch Fiduciaries, LLC (Melissa T Liebe)*
22. *Coconino County Public Fiduciary (Nancy Mueller)*
23. *Pinal County Public Fiduciary (Joan M Sacramento)*
24. *Childers & Berg, LLC (Donal D Childers)*
25. *East Valley Fiduciary Services, Inc. (James C Clark)*

CALL TO THE PUBLIC:.....*Pam Johnston, Chair*

ADJOURN:.....*Pam Johnston, Chair*