

FIDUCIARY BOARD

Meeting Agenda – Thursday, June 14, 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 May 10, 2012.

1-B: Review, discussion, and possible action regarding the Executive Session minutes of the meeting held on May 10, 2012.

2) PENDING COMPLAINTS.....*Linda Grau*

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 12-0002

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 § 3-302 and § 3-303; and court investigator training.

3-B: Review and discussion regarding possible future proposed amendments of Arizona Code of Judicial Administration § 7-201(E)(2)(c).

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

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

1. *Hanna Pisiak-Kusiak*
2. *William Boston*
3. *Glenn Gloria*
4. *Deborah Gilliland*
5. *Ann Lander*
6. *Alexandra Larson*

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

5-A: *Interview with and possible action regarding applicant Bonye W. Barone.*

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. *Donna Allison-Howard*
2. *Fred Appel*
3. *Rita Ashford*
4. *Mary Jane Baumgarten*
5. *Donna Benjamin*
6. *Pamela Bensmiller*
7. *Janice Bernardini*
8. *Leigh Bernstein*
9. *Jeanette Bloss*
10. *Tracy Boen*
11. *Lori Braddock*
12. *Milly Briggs*
13. *Daniel Bull*
14. *James Clark*
15. *Susan Cooper*
16. *Elizabeth Crosby*
17. *Jeanne Drabiak*
18. *Frank Escalante*
19. *Patricia Flores*
20. *Devon Forrest*
21. *Dixie Frederickson*
22. *Rebecca Ginsburg*
23. *Ronald Goldman*
24. *Linnea Grooms*
25. *Clare Guthrie*
26. *Teresa Hall*
27. *Linda Hamilton*
28. *John Harris*
29. *Elizabeth Hedger*
30. *Alexander Hobson*
31. *Deborah Holliday*

32. *Chalmer James*
33. *Anton Janik*
34. *Pamela Johnston*
35. *Carla Jones*
36. *Jacqueline Kanaga*
37. *Patricia Kellar*
38. *Yolanda Kennedy*
39. *Michael Klecka*
40. *Kay Kozak*
41. *Melissa Liebe*
42. *Leslie Mann-Damon*
43. *Fenton McDonough*
44. *Debra Mckee*
45. *Cecilia Mejia*
46. *Valerie Mills*
47. *Kathleen Moriarity*
48. *David Osollo*
49. *Sandra Paz*
50. *Linda Petersen*
51. *Tiffany Poarch*
52. *Gary Pope*
53. *Deborah Primock*
54. *Darra Rayndon*
55. *J.R. Rittenhouse*
56. *Catherine Robbins*
57. *Mark Rubin*
58. *Susan Rubin*
59. *Peter Santini*
60. *Carol Schmierer*
61. *Kathleen Schultz*
62. *Ranae Settle*
63. *Carol Severyn*
64. *Laura Short*
65. *Janie Singer*
66. *Vinay Singh*
67. *Carol Sodenquist*
68. *Rashida Suminski*
69. *Vergel Tan*
70. *Carol Ann Thompson*
71. *Shari Tomlinson*
72. *Christopher Tozzo*
73. *Peggy Van Norman*
74. *Richard Vanderheiden*
75. *Patricia Weiss*
76. *F.M. Westra*
77. *David Whipple*
78. *Theresa Whitfield*

79. *Heather Winters Bull*
80. *Craig Winsom*
81. *Melissa Woodburn*
82. *Robin Wright-Gordon*
83. *Joe Cannon*
84. *Deborah Dellisanti*
85. *Ruth Graham*
86. *Patricia Grenier*
87. *Shellie Hills*
88. *Sarah Holcomb*
89. *Linda Kohl*
90. *Richard Kruger*
91. *Laurie Kuzdal*
92. *Jeffrey Manley*
93. *Joel Margaretten*
94. *Anna Marie Martelli*
95. *Stephanie McCollum*
96. *Nancy Muller*
97. *Patricia Powers*
98. *Mark Ralles*
99. *Samuel Anderson*
100. *Alese Barkas*
101. *Lisa R. Druts*
102. *Scott Ferris*
103. *Glenn Hall*
104. *Patricia D. Hall*
105. *Chalmers James*
106. *Eric K. Macdonald*
107. *Clark Leuthold*
108. *Christina Rodriguez*
109. *Brian Williamson*
110. *Brian Bjorndahl*
111. *Gregory DeVico*
112. *Peggy DeVico*
113. *Audrey A. Hanks*
114. *Robin Michaelson*
115. *Marshall Herron*
116. *Jennifer Murray*
117. *Shawn M. Patterson*
118. *Joan Sacramento*
119. *Jason E. Cobb*
120. *Lisa Price*
121. *Tamarah Fitzsimmons*
122. *Jeannean Sabatina*
123. *Diana Serna*
124. *Candy Wheeler-Ruby*

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

1. *Bogutz & Gordon, P.C. - (Craig H Wisnom)*
2. *Care Coordinators – (Peggy S Van Norman)*
3. *Certified Fiduciary Services, Inc (Pamela Johnston)*
4. *Coconino County Public Fiduciary (Nancy Mueller)*
5. *Compass Fiduciary Group, LLC - (Jason E Cobb)*
6. *Conservators of Arizona, Inc. - (Michael J Klecka)*
7. *D.M. Benjamin CPA PC – (Donna M. Benjamin)*
8. *Entrust Fiduciary Services, Inc. – (Lisa M Price)*
9. *Estate Management Services, LLC - (Daniel E Bull)*
10. *Four Peaks Fiduciary Services, LLC – (Linnea K Grooms)*
11. *Integrated Fiduciary Services, Inc. – (Elizabeth Crosby)*
12. *Maricopa County Public Fiduciary – (Gary B Strickland)*
13. *Mohave County Public Fiduciary – (Catherin R Robbins)*
14. *Monarch Fiduciaries, LLC – (Melissa T Liebe)*
15. *Northern Arizona Fiduciaries, Inc – (Carla M Jones)*
16. *Pinal County Public Fiduciary – (Joan M Sacramento)*
17. *Premier Advocacy & Management Services LLC – (Pamela Johnston)*
18. *Ralles Law Firm, P.C. – (Mark T Ralles)*
19. *Rayndon & Associates, PLC – (Darra L Raydon)*
20. *Santa Cruz Public Fiduciary – (Rita Luz Ashford)*
21. *Sierra Huachuca Arc, Inc – (Mario A Gonzales)*
22. *Southwest Fiduciary, Inc. – (Gregory P Dovico)*
23. *Statewide Community Services, LLC – (Peggy A Dovico)*
24. *Yavapai County Public Fiduciary – (Shari Tomlinson)*
25. *Yuma County Public Fiduciary – (Candy M Wheeler-Ruby)*
26. *Childers & Berg, LLC – (Donal D Childers)*
27. *Apache County Public Fiduciary*
28. *Arizona Department of Veterans Services*
29. *East Valley Fiduciary Services, Inc. – (James C Clark)*
30. *Mesch, Clark & Rothschild – (Mark Rubin)*
31. *Mile High Fiduciaries, LLC – (Lisa R Drutz)*
32. *Pima County Public Fiduciary Office – (Philip H Grant)*

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

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