

FIDUCIARY BOARD

Meeting Agenda – Thursday, January 10, 2019

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 15, 2018.*

1-B: *Review, discussion and possible action regarding the executive session minutes of the meeting held on November 15, 2018.*

2) PENDING COMPLAINTS..... Division Staff

2-A: *Review, discussion and possible action regarding complaint numbers 15-0021, 15-0022 and 15-0023 involving license holders Ronald Goldman, Arizona Elder Care and Jennifer Goldman.*

2-B: *Review, discussion and possible action regarding complaint number 18-0033 involving license holder Leslie Mann-Damon.*

2-C: *Review of response from license holder regarding the Division Director dismissal of complaint number 18-0002.*

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

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

1. Amanda Sigmund
2. Janet Pipes

4) RENEWAL CERTIFICATION APPLICATIONS.....Division Staff

4-A: *Review, discussion and possible action regarding the following applications for renewal of individual and/or business entity Fiduciary licensure:*

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| 1. Meagan L. Adams | 40. Susan A. Siwek |
| 2. Lyndi L. Anderson | 41. Stephanie M. Soumis |
| 3. Steven J. Anderson | 42. Christopher M. Stubler |
| 4. Fred E. Appel | 43. Jennifer M. Stupski |
| 5. Warner B. Bair | 44. Rashida K. Suminski |
| 6. Mary E. Belasco | 45. Nicole A. Surran |
| 7. Pamela E. Bensmiller | 46. Beverly J. Tencza |
| 8. Leigh H. Bernstein | 47. Katherine E. Trojahn |
| 9. Tracy A. Boen | 48. Pablo Valencia |
| 10. Pamela J. Braun | 49. Peggy S. Van Norman |
| 11. Milly A. Briggs | 50. Tamara M. Varga |
| 12. Julianne Brogna | 51. Dawn R. Walters |
| 13. Daniel E. Bull | 52. Patricia L. Weiss |
| 14. Wendy R. Cohill | 53. Theresa Whitfield |
| 15. Phyllis J. Cornell | 54. Heather W. Winters Bull |
| 16. Ruth G. Covey | 55. Craig H. Wisnom |
| 17. Iris V. Crawford Bush | 56. Tesheena Yazzie |
| 18. Joshua Cuffe | 57. Assurance Fiduciary &
Financial Svcs. PLL |
| 19. Deborah A. Dellisanti | 58. Bogutz & Gordon, P.C. |
| 20. Mary Jane Dicresce | 59. Care Coordinators |
| 21. Janette Dominguez | 60. Certified Fiduciary Svcs., Inc. |
| 22. Jeanne L. Drabiak | 61. Condit and Associates, LLC |
| 23. Lisa R. Drutz | 62. Custom Care & Financial
Solutions LLC |
| 24. James M. Elliott | 63. Estate Management Svcs., LLC |
| 25. Scott R. Ferris | 64. Fleming & Curti, PLC |
| 26. Barbara J. Ficker | 65. Schraner Fiduciary Svcs., LLC |
| 27. Robert M. Ficker | 66. Southern Arizona Fiduciary
Svcs., LLC |
| 28. Robert B. Fleming | 67. Sterling Case Mgmt. & Fids. of
AZ., LLC |
| 29. Patrick J. Moore | 68. Stewardship Association |
| 30. Darra L. Rayndon | 69. Yavapai County Public
Fiduciary |
| 31. Eliza D. Read | 70. Yuma County Public Fiduciary |
| 32. Carrie L. Rednour | 71. Becky R. Brimhall |
| 33. J. R. Rittenhouse | 72. Edward J. Laber |
| 34. Crystal K. Rose Cillitto | 73. Camelback Fiduciary, LLC |
| 35. Mark D. Rubin | |
| 36. Candy M. Ruby | |
| 37. Peter Santini | |
| 38. Carol A. Severyn | |
| 39. Vinay M. Singh | |

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

5-A: *Review, discussion, and possible action regarding the voluntary surrender of licensure received from Vicky Whipple.*

6) ADMINISTRATIVE ISSUES Division Staff

CALL TO THE PUBLIC Deborah Primock, Chair

ADJOURN Deborah Primock, Chair