

FIDUCIARY BOARD

Meeting Agenda – Thursday, May 9, 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 ORDERDeborah 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 January 10, 2019.

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 18-0037 involving license holder Yvonne Stallings.

2-C: Review, discussion and possible action regarding complaint numbers 18-0007 through 18-0031 involving license holders Michael Bogle and East Valley Fiduciary Services, Inc.

2-D: Review, discussion and possible action regarding complaint numbers 17-0010 and 17-0011 involving license holders Jane Geisler and Managed Protective Services.

2-E: Review, discussion and possible action regarding complaint numbers 17-0029, 17-0030, and 17-0031 involving license holders Mario Martinez, Mark Sanelli and Fiduciary Solutions.

2-F: Review, discussion and possible action regarding complaint numbers 18-0042 & 18-0043 involving license holders Jason Cobb and Compass Fiduciary Group.

- 2-G: *Review, discussion and possible action regarding complaint numbers 18-0039, 18-0040, and 18-0041 involving license holders Gregory DeVico, Peggy DeVico, and Phillip DeVico.*
- 2-H: *Review, discussion and possible action regarding complaint number 18-0052 involving license holder Leslie Mann-Damon.*
- 2-I: *Review, discussion and possible action regarding complaint numbers 18-0048 and 18-0049 involving license holders Jane Geisler and Managed Protective Services, Inc.*
- 2-J: *Review, discussion and possible action regarding complaint number 18-0060 involving license holders Valerie Mills and Condit & Associates, LLC.*
- 2-K: *Review, discussion and possible action regarding complaint number 18-0047 involving license holder Susan Henley.*
- 2-L: *Review, discussion and possible action regarding complaint number 18-0057 involving license holder Mohave County Public Fiduciary.*

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

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

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| 1. Dane Dehler | 7. Heather Brower |
| 2. Gregory Poulos | 8. Ronald Patterson |
| 3. Karin Royle | 9. Alliance Fiduciary, LLC (Lori Braddock) |
| 4. Christine Wells | 10. Elite Fiduciary Services, LLC (Patricia Grenier) |
| 5. Jenna Einmo | |
| 6. Kelly Adamcik | |

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 licensure:*

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| 1. Samuel Anderson | 11. Susan Henley |
| 2. Jessica Fram | 12. Piedad Hogan |
| 3. Dawn Garcia | 13. Raena Honan |
| 4. Shawn Garner | 14. Brett Howard |
| 5. Deborah Gilliland | 15. William Howsden |
| 6. Cathleen Gray | 16. Natalie Hyde |
| 7. Jessica Gregg | 17. Darren Joe |
| 8. Patricia Grenier | 18. Annette Jones |
| 9. Glenn Hall | 19. Virginia Jones |
| 10. Heidi Harris | 20. Rick Kelley |

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| 21. Karen Kochhar | 42. Michele Peavy |
| 22. Linda Kohl | 43. Dora Pedrego |
| 23. Edward Laber | 44. Lew Ann Perry |
| 24. Teresa Lancaster | 45. Thomas Peterson |
| 25. Charles Latherow | 46. Rochelle Pones |
| 26. Jennifer Leitch | 47. Claudia Ramirez |
| 27. Clark Leuthold | 48. Denice Shepherd |
| 28. Eric Macdonald | 49. Marion Shontz |
| 29. Anita Mackowiak | 50. Fitzsimmons Fiduciary Services, LLC |
| 30. Debra Mckee | 51. Garcia Fiduciary Group, LLC |
| 31. Paul Melo | 52. Geriatric Assessment Mngmt & Solutions, LLC |
| 32. Valerie Mills | 53. Grand Canyon Senior Care, LLC |
| 33. Jacquelyne Mingle | 54. Jewish Family and Children's Services of Southern Arizona, INC |
| 34. Nancy Mueller | 55. Laber & Laber, PLC |
| 35. Kimberlie Musselman | 56. Mile High Fiduciaries, LLC |
| 36. Vanessa Nefflen | 57. Navajo County Public Fiduciary |
| 37. Joseph Noviello | 58. Pima County Public Fiduciary Office |
| 38. Mirna Oldham | 59. San Pedro Fiduciary Services, LLC |
| 39. Martelle Olsen | 60. Ranae Settle |
| 40. Jeff Ozuna | |
| 41. Shawnie Patterson | |

CALL TO THE PUBLIC*Deborah Primock, Chair*

ADJOURN*Deborah Primock, Chair*