

# CONFIDENTIAL INTERMEDIARY BOARD

## Meeting Agenda – November 18, 2025

Arizona Supreme Court -1501 West Washington Street  
Phoenix, Arizona 85007 – 10:00AM Zoom/Conference Room 106  
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 (under ACJA Sec. 1-202(C)(5)(c)) or for discussion or consideration of records or matters made confidential or privileged by statute, court rule, or the Arizona Code of Judicial Administration (under ACJA Sec. 1-202(C)(5)(b)).**

**CALL TO ORDER.....** *Margaret E. Dewey, Chair*

**1) REVIEW AND APPROVAL OF MINUTES.....** *Margaret E. Dewey, Chair*

*1-A: Review, discussion, and possible action regarding the regular session minutes of the meeting held on April 15, 2025.*

**2) PENDING COMPLAINTS.....** *Division Staff*

*2-A: Update regarding pending complaints.*

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

*3-A: Review, discussion and possible action regarding initial application for Confidential Intermediary certification:*

1. Craig Lowe

*3-B: Review, discussion and possible action regarding renewal applications for Confidential Intermediary certification for the 2022-2024 and 2024-2026 renewal certification periods:*

1. Sheila Perry

**4) ADMINISTRATIVE ITEMS.....** *Division Staff*

*4-A: Review, discussion, and possible action regarding Confidential Intermediary Board 2026 meeting dates.*

*4-B: Division Updates.*

**CALL TO THE PUBLIC.....Margaret E. Dewey, Chair**

**LIMITED BOARD RESPONSE TO CALL TO THE PUBLIC...Margaret E. Dewey, Chair**

*Individual members of the Board may take one or more of the following actions: (a) respond to criticism made in Public Comment; (b) ask staff to review a matter raised in public comment; or (c) ask that a matter raised in public comment be put on a future agenda. NOTE: Neither the Board as a whole nor Staff are permitted to discuss a matter raised in public comment and the Board is not permitted to vote on a matter raised during an open call to the public unless the matter was otherwise properly noticed on the meeting agenda for discussion and legal action.*

**ADJOURN..... Margaret E. Dewey, Chair**

**Persons with a disability may request a reasonable accommodation, such as a sign language interpreter, by contacting the Division at 602-452-3378 or TDD 602-452-3534. A person requesting an accommodation should make the request as early as possible to allow time to arrange the requested accommodation.**