

CONFIDENTIAL INTERMEDIARY BOARD MEETING MINUTES

Date: April 15, 2025

Time: 10:00 A.M.

Location: Arizona State Courts Building
1501 West Washington Street Room 106/Zoom
Phoenix, Arizona 85007



Zoom Meeting Video Recording: [April 15, 2025 CI Meeting](#)

Note: The meeting started at 10:01 A.M., however, the Zoom recording did not start until 10:13 A.M.

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)).

Member Attendance	In Person	Zoom	Absent
Margaret E. Dewey, Chair		X	
Margaret Stephens-Reed (Joined at 10:03AM)		X	
Nance Daley			X
Dana Young		X	
Honorable Maurice Portley (Ret.)			X
Honorable Peter Hochuli		X	
Vernon Harris		X	

Staff	Guests
Kristina Tuba	
Chris Acree	
Cicilyann Martinez	

Call To Order Margaret E. Dewey, Chair

Time: 10:01 A.M.

1) Review and Approval of Meeting Minutes Margaret E. Dewey, Chair

1-A: Review, discussion, and possible action regarding adopting the regular session recording and written minutes of the meeting held on November 19, 2024.

Motion to approve November 19, 2024, minutes.

First: Vernon Harris

Second: Dana Young

Pass/Fail: Pass

2) Pending Complaints Division Staff

2-A: Update regarding pending complaints.

Informational update.

3) Licensure and Eligibility Division Staff

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

1. Gary Moss

Motion to accept Division Staff's recommendation for initial certification approval with standard nondisclosure language.

First: Hon. Peter Hochuli

Second: Vernon Harris

Pass/Fail: Pass

2. Kelly Rourke-Evans

Motion to accept Division Staff's recommendation for initial certification approval with a later effective date once fingerprint results have been confirmed by Division Staff.

First: Hon. Peter Hochuli

Second: Vernon Harris

Pass/Fail: Pass

3. Sheri Steincamp

Motion to accept Division Staff's recommendation for initial certification approval with a later effective date once fingerprint results have been confirmed by Division Staff.

First: Hon. Peter Hochuli

Second: Vernon Harris

Pass/Fail: Pass

4. Ashley Trussell

Motion to accept Division Staff's recommendation for initial certification approval with standard nondisclosure language and a later effective date once fingerprint results have been confirmed by Division Staff.

First: Vernon Harris

Second: Hon. Peter Hochuli

Pass/Fail: Pass

Note: Division Staff started recording the meeting at 10:13 AM.

5. Craig Lowe

Motion to accept Division Staff’s recommendation for initial certification approval with a later effective date once fingerprint results have been confirmed by Division Staff.

First: Vernon Harris

Second: Hon. Peter Hochuli

Pass/Fail: Pass

3-B: Review, discussion and possible action regarding renewal applications for Confidential Intermediary certification:

- 1. Brian Messenger

Motion to accept Division Staff’s recommendation for renewal certification approval for the 2024-2026 certification period.

First: Hon. Peter Hochuli

Second: Vernon Harris

Pass/Fail: Pass

- 2. Judy Schubert

Motion to accept Division Staff’s recommendation for renewal certification approval for the 2024-2026 certification period.

First: Vernon Harris

Second: Hon. Peter Hochuli

Pass/Fail: Pass

Note: Maragret Stephen Reed recused.

4) Administrative Items Division Staff

4-A: *Division Updates.*

Informational update.

Call to the Public Margaret E. Dewey, Chair

No comments were made.

ADJOURN Margaret E. Dewey, Chair

The meeting adjourned at 10:24 A.M.

Next Confidential Intermediary Meeting: November 18, 2025