

CONFIDENTIAL INTERMEDIARY BOARD MEETING MINUTES

Date: April 14, 2026

Time: 10:00 A.M.

Location: Arizona State Courts Building
1501 West Washington Street Room 109/Zoom
Phoenix, Arizona 85007



Zoom Meeting Video Recording: [April 14, 2026 CI Meeting](#)

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
Vernon Harris, Chair		X	
Honorable Anne M. Borowiec		X	
Dana Young	X		
Margaret E. Dewey		X	
Margaret Stephens-Reed		X	
Honorable Maurice Portley (retired)		X	

Staff

Abby Raddatz Pasquale Fontana
Kristina Tuba Crystal Jones
Marina Hodzic Dwayne Hayward
Yessibell Romero

Guests

Victoria Mikoch
Brian Messenger
Patti Shaughnessy
Laurie Desmarais
Ashley Trussell

Vote Count Key: Yay - Nay – Abstain - Recused – Absent

Call To Order **Vernon Harris, Chair**
Time: 10:01 A.M.

1) Review and Approval of Meeting Minutes **Vernon Harris, Chair**

1-A: Review, discussion, and possible action regarding adopting the regular session recording and written minutes of the meeting held on November 18, 2025.

Motion to approve the regular session and written minutes of the November 18, 2025, meeting with the noted correction.

First: Hon. Maurice Portley

Second: Vice Chair Dana Young

Passed: 6-0-0-0-0

2) Election of a Vice Chair Vernon Harris, Chair

2-A: *Under ACJA §7-201(l)(3)(b), the members are to elect a vice chair to a specified term.*

Motion to approve Dana Young to serve as vice chair for the duration of her current board appointment.

First: Margaret Dewey

Second: Hon. Maurice Portley

Passed: 6-0-0-0-0

3) Pending Complaints Division Staff

3-A: *Update regarding pending complaints.*

As of April 1, 2026, there are zero pending complaints.

3-B: *Review, discussion and possible action regarding Complaint No. 25-CI001 involving certificate holder, Laurie Desmarais.*

Motion to accept Division Staff’s recommendation to issue a letter of concern.

First: Margaret Dewey

Second: Hon. Maurice Portley

Passed: 5-1-0-0-0

Note: Dana Young opposed. Laurie Desmarais addressed the board.

4) Licensure and Eligibility Division Staff

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

1. Kathleen Hoopes

Motion to accept Division Staff’s recommendation to approve initial certification with standard nondisclosure language.

First: Vice Chair Dana Young

Second: Margaret Reed

Passed: 6-0-0-0-0

4-B: *Clerical update to November 18, 2025, agenda item 3-B for name corrections.*

Agenda item 4-B was concurrently addressed with 1-A.

4-C: *Review, discussion and possible action regarding the Confidential Intermediary Directory on the AZCourts.gov website.*

Victoria Mikoch presented, including portions on behalf of Diane Stubbs due to technical difficulties.

5) Administrative Items Division Staff

5-A: Division Updates.

Informational update.

Call to the Public Vernon Harris, Chair

Brian Messenger and Patti Shaughnessy addressed the board. Following the Call to the Public, the Board briefly discussed the potential to assist tribal members by facilitating the transmission of original birth certificates to tribal nations. This matter will be placed on the agenda for the November 17, 2026 meeting.

ADJOURN Vernon Harris, Chair

Motion to adjourn.

First: Vice Chair Dana Young

Second: Hon. Maurice Portley

Passed: 6-0-0-0-0

Next Confidential Intermediary Meeting: November 17, 2026

