

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda – Monday, July 18, 2016

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:00 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.....Mary Carlton, Chair

1) REVIEW AND APPROVAL OF MEETING MINUTES.....Mary Carlton, Chair

1-A: Review, discussion, and possible action regarding approval of the regular session minutes of the meeting of May 23, 2016.

2) PENDING COMPLAINTS/RENEWAL OF CERTIFICATION.....Division Staff

2-A: Review, discussion and possible action regarding Findings of Fact, Conclusions of Law and Recommendation in complaint numbers 15-L008 and 15-L009, involving Penny Burley and That Paralegal Place.

2-B: Review, discussion and possible action regarding complaint number 15-L014.

2-C: Review, discussion and possible actions regarding:

i. Complaint number 15-L020; and

ii. Renewal of certification involving certificate holder, Erlinda Yount.

2-D: Review, discussion and possible actions regarding:

i. Complaint number 15-L006; and

ii. Renewal of certification involving certificate holder, Sergio Diaz.

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

3-A: Review, discussion and possible action regarding the following applications for initial, individual, business entity legal document preparer certification and business entity exemption requests:

1. Cindy Boes

2. Danielle Kentch

3. Karen Mortensen
4. Virginia Parry
5. Family Tree Estate Planning, LLC
6. Jaimee Paine
7. Laura Warren
8. Patsy Ciardullo
9. Veronica Samaniego
10. Jessica Thomas
11. The Aurit Center for Mediation, LLC

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

4-A: Review, discussion and possible action regarding the following applications for renewal of individual legal document preparer certification:

1. Vanessa Bermudez
2. Thomas Steele

4-B: Review, discussion and possible action regarding the following applications for renewal of individual legal document preparer certification and continuing education audit submissions:

1. Jacqueline Bosnic
2. Stephen Trezza

5) CERTIFICATION AND ELIGIBILITYDivision Staff

5-A: Review, discussion and possible action regarding request for Inactive Status from certificate holder, Grace Elmer.

5-B: Review, discussion and possible action regarding request for waiver of continuing education requirements from certificate holder, Stephanie Villalobos.

5-C: Review, discussion and possible action regarding the request for an extension to complete continuing education requirements from certificate holder, Jolie Fontana-Black.

5-D: Review, discussion and possible action regarding request for Voluntary Surrender from certificate holder, Heather Yearack.

5-E: Update regarding Bernadette Barba's Request for Certification and subsequent denial.

6) LETTERS TO THE BOARD.....Division Staff

6-A: Review of letters from Americana Services in response to disposition of Complaint Nos. 15-L017, L018 and L019.

7) ADMINISTRATIVE ISSUES.....Division Staff

7-A: Update on subcommittee to review possible Code changes concerning continuing education.

7-B: Update on Consent Agreement for Daniel Carrasco.

CALL TO THE PUBLIC.....Mary Carlton, Chair

ADJOURN.....Mary Carlton, Chair