

CONFIDENTIAL INTERMEDIARY BOARD

Meeting Agenda – Thursday, December 11, 2014

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..... Laurie Laughlin, Chair

1) REVIEW AND APPROVAL OF MINUTES Laurie Laughlin, Chair

1-A: Review and approval of regular minutes for the meeting of August 14, 2014.

2) ADMINISTRATIVE ISSUESDivision Staff

2-A: Update regarding the 2014 confidential intermediary training.

3) INITIAL CERTIFICATION AND ELIGIBILITY.....Wendy Reiter

3-A: Review, discussion and possible action regarding the following applications for initial certification:

Kristen Thuma
Kenneth McLeod

4) RENEWAL CERTIFICATION APPLICATIONS.....Kimberly Siddall

1. Laura L. Kaiblinger
2. Judy Schubert*
3. Jeannette E. Casselman
4. Joan C. Moreaux*
5. Elizabeth A. McCarty*
6. Jean D. McFarlane
7. Victoria I. Mikoch*
8. Margaret E. Dewey
9. Diane L. Stubbs
10. Hillary Kaminsky
11. Jacque R. Bell

12. Darlene D. Reimer
13. Alice D. Ernst*
14. Anne Jensen
15. Laurie L. Kuzdal
16. Mary A. Haldeman
17. Contance H. Harrington
18. Joyce J. Schmidt
19. Deborah L. Sullivan
20. Susan G. Thomas
21. Michael P. Wydra
22. Elaine M. Lambert Williams
23. Vickie M. Edwardson
24. Michelle T. Yontef*
25. Kristen E. Hamilton
26. Mary E. Fornino
27. Sarah L. Jennings
28. Marie A. Kiszczak
29. Dana Young*
30. Nance A. Daley
31. Patricia Shaughnessy
32. Dorothy M. Doctor

CALL TO THE PUBLIC *Laurie Laughlin, Chair*

ADJOURN *Laurie Laughlin, Chair*

CONFIDENTIAL INTERMEDIARY BOARD
Agenda Summary – Thursday, December 11, 2014

1) REVIEW AND APPROVAL OF MINUTES

I-A: Review, discussion, and approval of regular session minutes for the meeting of August 14, 2014.

Attached for the Board's review and approval are the draft regular session minutes for the meeting of August 14, 2014.

CONFIDENTIAL INTERMEDIARY BOARD

Agenda Summary – Thursday, December 11, 2014

2) ADMINISTRATIVE ISSUES

2-A: Update regarding the 2014 confidential intermediary training.

Wendy Reiter will give an overview to the Board with respect to the CI training held on November 19, 20 and 21, 2014.

CONFIDENTIAL INTERMEDIARY BOARD

Agenda Summary – Thursday, December 11, 2014

3) INITIAL CERTIFICATION AND ELIGIBILITY

3-A: Review, discussion and possible action regarding the following applications for initial certification:

1. Kristen Thuma

The following applicant has completed the required Confidential Intermediary Training, passed the Confidential Intermediary Examination and submitted an application for certification. Division staff has determined that the applicant meets the minimum eligibility requirements for certification and the background review revealed no information contrary to certification being granted. It is recommended certification be granted to applicant Kristen Thuma.

2. Kenneth McLeod

Kenneth McLeod has completed the required Confidential Intermediary Training, passed the Confidential Intermediary Examination and submitted an application for certification. Division staff has determined that the applicant meets the minimum eligibility requirements for certification, however, Mr. McLeod submitted a written request to withdraw prior to the completion of the certification process. It is recommended the Board accept Mr. McLeod's request to withdraw from the CI program.

CONFIDENTIAL INTERMEDIARY BOARD

Agenda Summary - Thursday, December 11, 2014

4) RENEWAL CERTIFICATION APPLICATIONS

4-A: *Review, discussion, and possible action regarding the following pending applications for renewal of certification:*

The following certificate holders have submitted applications for renewal of certification. Of the 32 applications 2 of the certificate holders disclosed being involved in civil actions and 1 failed to disclose a tax lien. In the opinion of staff, the applications are complete, no other information has been presented during the background review which is contrary to certification being granted and the certificate holders have demonstrated they meet the minimum eligibility requirement for renewal. Therefore, it is recommended to grant renewal of certification to the following:

1. Laura L. Kaiblinger
2. Judy Schubert*
3. Jeannette E. Casselman
4. Joan C. Moreaux*
5. Elizabeth A. McCarty*
6. Jean D. McFarlane
7. Victoria I. Mikoch*
8. Margaret E. Dewey
9. Diane L. Stubbs
10. Hillary Kaminsky
11. Jacque R. Bell
12. Darlene D. Reimer
13. Alice D. Ernst*
14. Anne Jensen
15. Laurie L. Kuzdal
16. Mary A. Haldeman
17. Contance H. Harrington
18. Joyce J. Schmidt
19. Deborah L. Sullivan
20. Susan G. Thomas
21. Michael P. Wydra
22. Elaine M. Lambert Williams
23. Vickie M. Edwardson
24. Michelle T. Yontef*
25. Kristen E. Hamilton
26. Mary E. Fornino
27. Sarah L. Jennings
28. Marie A. Kiszczak
29. Dana Young*

30. Nance A. Daley
31. Patricia Shaughnessy
32. Dorothy M. Doctor

*Audited for continuing education hours