

Board of Legal Document Preparers

Arizona State Courts Building
1501 West Washington Street
Phoenix, Arizona 85007



Date: July 22, 2013
Time: 10:00 a.m.
Hearing Room 109

Approved Regular Meeting Minutes

MEMBER ATTENDANCE:

Present:

Mary Carlton
Paul Friedman
Becky Nilsen
Cheri Clark

Telephonically Present:

Pamela Milburn
Bonnie Matheson
Mary Jo Randall
Deborah Young
Hon. Samuel Myers
Jerry Thomas

Absent:

Deborah Colon-Mateo

OTHER ATTENDEES

AOC Staff:

Mark Wilson
Deborah MacDougall
Linda Grau
Kimberly Siddall
Anne Hunter
Michelle Jackson

Guests:

Doug Nebel
Rebecca Bottjen
Vanessa Bermudez
Maltide Ortiz

CALL TO ORDER

Called to Order By:

Mary Carlton, Chair

Time:

9:59 a.m.

1) REVIEW AND APPROVAL OF MEETING MINUTES

Individual Addressing the Board:

Mary Carlton, Chair

1-A: *Review, discussion and possible action regarding approval of the regular session minutes of the meeting of June 24, 2013.*

Discussion: None

Motion: Move to approve.

Motion Proposals: First Paul Friedman
Second Pamela Milburn

Motion Results: Pass

Recusal:

2) REVIEW OF PENDING COMPLAINTS

Individual Addressing the Board:

Debbie MacDougall

2-A: *Review, discussion and possible action regarding the following non certificate holder complaint number NC2013-L010 involving Jennifer Potter.*

Discussion: Complaint Number NC2013-L010 - Jennifer Potter

Motion: Move to issue a cease and desist letter.

Motion Proposals: First Becky Nilsen
Second Paul Friedman

Motion Results: Pass

3) **ADMINISTRATIVE ISSUES**

Individuals Addressing the Board: Debbie MacDougall and Mark Wilson

3-A: *Update regarding complaints processed by diversion pursuant to Administrative Order 2012-83.*

Discussion: No cases to report to the Board at this time.

3-B: *Discussion and possible action concerning the Division's investigative findings and subsequent disclosure of information to the Board.*

Motion: Motion is read and brief discussion is held by the Board. Move to approve the motion as written.

Motion Proposals: First Mary Carlton
Second Paul Friedman

Motion Results: Pass

4) **INITIAL CERTIFICATION APPLICATIONS**

Individual Addressing the Board: Kimberly Siddall

4-A: *Review, discussion and possible action regarding the following pending applications for the 2013-2015 certification period:*

*Carmen Dominguez
Annick Haske
Melanie Cupp
Paralegal 2 U (Kimberly Sisk)
Leonard Trujillo
Leslie Menegay
Monica Valenzuela
Deborah Yoder
Matilde Ortiz
Tanya Giordan
Vanessa Bermudez
Centro De Progreso, LLC (Vanessa Bermudez)
Kortsen Legal Document Preparation, LLC (Mary Kortsen)
Simental Documents LLC (Sandra Simental Garcia)
Prescott Tax & Paralegal LLC (Arlene Rheinfelder)*

Discussion: Carmen Dominguez
Annick Haske
Melanie Cupp
Paralegal 2 U (Kimberly Sisk)

Motion: Move to grant initial certification.

Motion Proposals: First Paul Friedman
Second Mary Carlton

Motion Results: Pass
Recusal Becky Nilsen for Melanie Cupp

Discussion: Leonard Trujillo

Motion: Move to accept the applicant's withdrawal for initial certification.

Motion Proposals: First Becky Nilsen
Second Paul Friedman

Motion Results: Pass

Discussion: Leslie Menegay
Monica Valenzuela

Motion: Move to grant initial certification.

Motion Proposals: First Paul Friedman
Second Becky Nilsen

Motion Results: Pass

Discussion: Deborah Yoder
Matilde Ortiz
Tanya Giordan
Vanessa Bermudez
Centro De Progreso, LLC (Vanessa Bermudez)
Kortsen Legal Document Preparation, LLC (Mary Kortsen)
Simental Documents LLC (Sandra Simental Garcia)
Prescott Tax & Paralegal LLC (Arlene Rheinfelder)

Motion: Move to defer until the next meeting.

Motion Proposals: First Paul Friedman
Second Becky Nilsen

Motion Results: Pass

6) RENEWAL CERTIFICATION APPLICATIONS
Individual Addressing the Board:

Kimberly Siddall

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

Bruce Davidson

Stacie Duke

Nadia Meza

Dale Shephard

Joe Civarrubias

Ana Dabbs

Lynn Forman

June Pelletier

Sandra Place

Teri Parcels

Catharine Longman

Edward Hooper

Nancy Anderson

David Hoyt

Guadalupe Taylor

Jesse Torres

Lori Kort

Carol Keller

Walter Marcus

Discussion: None.

Motion: Move to grant renewal of standard certification to the applicants.

Motion Proposals: First Becky Nilsen
Second Paul Friedman

Motion Results: Pass

CALL TO THE PUBLIC

Mary Carlton, Chair

None

ADJOURNMENT

Mary Carlton, Chair

Motion: Move to adjourn.

Motion Proposals: First Becky Nilsen
Second Cheri Clark

Motion Results: Pass

Time: 10:14 a.m.