

# BOARD OF LEGAL DOCUMENT PREPARERS

## Meeting Agenda – Monday, March 27, 2017

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

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**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).**

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**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 January 25, 2017.*

*1-B: Review, discussion and possible action regarding amendment to approved regular session minutes of the meeting of October 17, 2016.*

**2) PENDING COMPLAINTS.....*..Division Staff***

*2-A: Review, discussion and possible action regarding the Division Director dismissal of complaint number 16-L032.*

*2-B: Review, discussion and possible action regarding complaint number NC16-L032, involving non-certificate holders, Christine Duso and Do It Pro Per, LLC.*

*2-C: Review, discussion and possible action regarding complaint numbers 16-L007/16-L008, involving certificate holders, Shannon Trezza and Arizona Statewide Paralegal.*

*2-D: Review, discussion and possible action regarding complaint numbers 16-L010/16-L011, involving certificate holders, Shannon Trezza and Arizona Statewide Paralegal.*

*2-E: Review, discussion and possible action regarding Findings of Fact, Conclusions of Law and Recommendation regarding complaint number 15-L006, involving certificate holder, Sergio Diaz.*

*2-F: Review, discussion and possible action regarding complaint number 16-L009, involving certificate holder, Alejandro J. Torres.*

2-G: *Review, discussion and possible action regarding complaint number 16-L012, involving certificate holder, Jesse Torres.*

2-H: *Review, discussion and possible action regarding complaint numbers 16-L017/16-L018, involving certificate holders, Barton Stevens and Stevens Special Needs Planning, LLC.*

2-I: *Review, discussion and possible action regarding complaint number 16-L030, involving certificate holder, Betty Ulibarri.*

**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. AZ Paralegal Assist, LLC (Ella Blass)
2. Document Prep & Process Pros, Inc. (Patricia Steward)
3. Larry D. Schwartz, Ltd.
4. What-A-Lark, Ltd. (Kira Reitz)
5. Susan Clark-Morales
6. Lisa Byrd
7. Sheila Perry
8. Stacy Bethea
9. Valerie Tapia
10. Jaron Perkins

**4) CERTIFICATION AND ELIGIBILITY .....Division Staff**

4-A: *Review, discussion and possible action regarding request for Voluntary Surrender from certificate holder, Cindy McCoy.*

4-B: *Review, discussion and possible action regarding request for placement on Active Status received from Walter Marcus.*

**5) ADMINISTRATIVE ISSUES.....Division Staff**

5-A: *Update regarding proposed Code changes concerning continuing education and certification issues.*

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

**ADJOURN.....Mary Carlton, Chair**