

# FIDUCIARY BOARD

Meeting Agenda – Thursday, July 14, 2011

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:30 a.m. - 2:30 p.m. in 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, Section § 1-202(C).

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CALL TO ORDER .....*Kip Anderson, Chair*

1) REVIEW AND APPROVAL OF MINUTES.....*Division Staff*

1-A: *Review, discussion, and possible action regarding the regular session minutes of the meeting held on May 12, 2011.*

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

2-A: *Review, discussion and possible action regarding Arizona Department of Veterans' Services' non-compliance with the Board's Final Order issued in complaint number 09-0001 and the status of ADVS' probation in the Consent Agreement entered in complaint number 07-0027.*

2-B: *Formal Interview with Peter Frenette and Sun Valley Group regarding complaint number 07-0023.*

2-C: *Review, discussion and possible action regarding complaint number NC11-L012 involving Paul Noseworthy.*

3) ADMINISTRATIVE ISSUES.....*Division Staff*

3-A: *Review and discussion regarding the status of work performed by the Committee on Improving Judicial Oversight and Processing of Probate Court Matters ("Probate Committee").*

3-B: *Review, discussion and possible action regarding the implementation of SB1499 and the recommendation of the Committee on Improving Judicial Oversight and Processing of Probate Court Matters.*

**4) INITIAL LICENSE APPLICATIONS.....Division Staff**

4-A: *Review, discussion, and possible action regarding the following pending applications for initial licensure:*

1. *Devon E. Forrest*
2. *Clarence S. Scott*
3. *Lori Lashley*
4. *David B. Whipple*
5. *Victor L. Hess*

**5) RENEWAL LICENSE APPLICATIONS.....Division Staff**

5-A: *Review, discussion, and possible action regarding renewal of licensure for the following licensed fiduciaries:*

1. *Heather Frenette*
2. *Peter Frenette*
3. *Stephanie McCollum*
4. *Anita Royal*

5-B: *Review, discussion, and possible action regarding renewal of business entities:*

1. *The Sun Valley Group, Inc. (Peter Frenette)*
2. *Pima County Public Fiduciary Office (Anita Royal)*

**CALL TO THE PUBLIC .....Kip Anderson, Chair**

**ADJOURN .....Kip Anderson, Chair**