

FIDUCIARY BOARD

Meeting Agenda – Thursday, May 9, 2013

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:30 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, Section § 1-202(C).

CALL TO ORDER*Deborah Primock, Chair*

1) REVIEW AND APPROVAL OF MINUTES.....*Deborah Primock, Chair*

1-A: Review, discussion, and possible action regarding the regular session minutes of the meeting held on March 14, 2013.

2) PENDING COMPLAINTS.....*Mark Wilson and Linda Grau*

2-A: Review, discussion and possible action regarding the following complaints:

Complaint Number 09-0009 – Stephanie McCollum

Complaint Number 09-0010 – Stephanie McCollum

Complaint Number 10-0006 – Leigh Bernstein

Complaint Number 12-0008 – Gary Strickland

2-B: Review, discussion and possible action regarding the Division Director dismissal of complaint number 12-0001.

3) ADMINISTRATIVE ISSUES.....*Mark Wilson*

3-A: Update on quarterly diversion report.

4) INITIAL LICENSE APPLICATIONS.....*Wendy Reiter*

4-A: Review, discussion, and possible action regarding the following pending applications for individual and/or business entity licensure:

1. Katrina Chavez

2. *Thomas H. Peterson, III*
3. *Robert Beecher*

5) LICENSURE AND ELIGIBILITY.....*Wendy Reiter*

5-A: *Review, discussion, and possible action regarding request for placement on inactive status received from the following licensed fiduciary:*

1. *Connie Dohm, license number 20656*

5-B: *Review, discussion, and possible action regarding the following pending application for renewal of individual fiduciary licensure:*

1. *Mark Mitchell, license number 20278*

5-C: *Review, discussion, and possible action regarding the voluntary surrenders of license received from the following licensed fiduciaries:*

1. *Linnea K. Grooms, license number 20629*
2. *Four Peaks Fiduciary Services, LLC, license number 20640 (designated principal, Linnea K. Grooms)*

5-D: *Review, discussion, and possible action regarding the request of Claudia Ramirez to retake the Fiduciary Licensing Examination.*

CALL TO THE PUBLIC:.....*Deborah Primock, Chair*

ADJOURN:.....*Deborah Primock, Chair*