

FIDUCIARY BOARD

Meeting Agenda – Thursday, March 14, 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 January 16, 2013.

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

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

Complaint Number 09-0021 – Peter Frenette and Sun Valley Group, Inc.

Complaint Number 09-0024 – Peter Frenette and Sun Valley Group, Inc.

Complaint Number 10-0012 – Donna Allison-Howard

Complaint Number 10-0013 – Maricopa County Public Fiduciary

Complaint Number 10-0017 – Mile High Fiducairy and Lisa Drutz

Complaint Number 11-0010 – Robin Michaelson

Complaint Number 11-0009 – Anita Royal

2-B: Review, discussion and possible action regarding complaint number 08-0031 involving Lisa Price and Entrust Fiduciary Services Inc.

3) ADMINISTRATIVE ISSUES.....*Mark Wilson and Kimberly Siddall*

3-A: Update on quarterly diversion report.

3-B: Review, discussion, and possible action regarding the passing score and study guide for the fiduciary exam.

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. Ana Perez-Arrieta*
- 2. William Trusler*
- 3. Eliza Read*
- 4. Jamie Silva*
- 5. Russell Murphy*

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 fiduciaries:

- 1. Mary Jane Baumgarten, license number 20416*
- 2. Phillip Ioset, license number 20565*
- 3. Evelyn Saunders, license number 20244*

5-B: Review, discussion, and possible action regarding the voluntary surrender of license received from the following licensed fiduciary:

- 1. Brian Williamson, license number 20674*

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

ADJOURN:.....Deborah Primock, Chair