

# FIDUCIARY BOARD

## Meeting Agenda – Thursday, July 11, 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

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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** .....*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 May 9, 2013.*

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

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

*Complaint Number 11-0001 – Donna Allison-Howard*

*Complaint Number 11-0016 – Fiduciary Solutions, LLC*

*Complaint Number 11-0002 – Maricopa County Public Fiduciary*

*Complaint Number 11-0017 – David Osollo*

*Complaint Number 12-0012 – Gila County Public Fiduciary*

*Complaint Number 12-0003 – Patricia Hall*

*Complaint Number 12-0013 – Robert Fleming and Fleming and Curti, PLC*

*Complaint Number 12-0011 – Maricopa County Public Fiduciary*

*Complaint Number 13-0001 – Mohave Estate Management Office*

*2-B: Review, discussion and possible action regarding the Division Director dismissal of complaint numbers 12-0001 and 13-0005.*

*2-C: Review, discussion and possible action regarding complaint number 07- 0014 involving Anita Royal and the Pima County Public Fiduciary Office.*

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

*3-A: Update on diversion report.*

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

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. Pamela St. Pierre
2. Ramona Dewar
3. April Riedel
4. Scott Whitney
5. Katherine Trojahn

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 request for placement on inactive status received from the following licensed fiduciaries:*

1. Raena Honan, license number 20547
2. RaShara Badilla, license number 20010

5-C: *Informal interview with Claudia Ramirez regarding her request to retake the Fiduciary Licensing Examination.*

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

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