

FIDUCIARY BOARD

Meeting Agenda – Thursday, September 12, 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 July 11, 2013.

2) PENDING COMPLAINTS.....*Linda Grau*

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

Complaint Number 12-0003 - Patricia Hall

Complaint Number 10-0011 - Entrust Fiduciary Services, Inc.

Complaint Number 13-0003 – Ruth Graham

Complaint Number 11-0003 – John Harris

Complaint Number 12-0010 – Rena Steele

2-B: Review, discussion and possible action regarding the Division Director dismissal of complaint number 13-0011.

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

3-A: Update regarding complaints processed by diversion pursuant to Administrative Order 2012-83.

4) LICENSURE AND ELIGIBILITY.....*Kimberly Siddall*

4-A: Review, discussion, and possible action regarding the voluntary surrender of license received from the following licensed fiduciaries:

1. *Chalmers T. James, Jr., license number 20295*
2. *Dixie Fredrickson, license number 20202*
3. *Christina I. Rodriguez, license number 20679*

5) INITIAL LICENSE APPLICATIONS.....*Kimberly Siddall/Wendy Reiter*

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

1. *RHL Fiduciary LLC (Robert Harner)*
2. *Jennifer Goldman*
3. *Kelly Ellis*
4. *Katherine Trojahn*
5. *Philip DeVico*
6. *Fred Cohen*

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

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