

# FIDUCIARY BOARD

## Meeting Agenda – Thursday, March 12, 2015

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, Code 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 November 13, 2014.*

*1-B: Review, discussion and possible action regarding the regular session minutes of the meeting held on January 8, 2015.*

**2) PENDING COMPLAINTS/RENEWAL OF LICENSURE**..... *Division Staff*

*2-A: Review, discussion, interview and possible action regarding Stephanie McCollum concerning complaint number 09-0007.*

*2-B: Review, discussion and possible action regarding Gregory DeVico and Southwest Fiduciary, Inc., settlement proposal concerning complaint number 13-0004 and applications for renewal of licensure.*

*2-C: Review, discussion, and possible action regarding Mario Martinez and Fiduciary Solutions, complaint number 14-0001/14-0002 and applications for renewal of licensure.*

*2-D: Review, discussion, and possible action regarding Leslie Mann-Damon, complaint number 14-0003.*

**3) INITIAL LICENSURE AND ELIGIBILITY**..... *Division Staff*

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

*1. Paul Melo*

2. *Virginia Flores*
3. *Donna Morrison*
4. *Nicolle Escalante*
5. *Bradley Torch*

**4) RENEWAL OF LICENSURE APPLICATIONS.....*Kimberly Siddall***

4-A: *Review, discussion, and possible action regarding the following pending applications for renewal of individual and business licensed fiduciaries:*

1. *Rena Steele*
2. *Jane Anne Geisler and Managed Protective Services Inc.*
3. *Catherine Robbins and Maricopa County Public Fiduciary*
4. *Patricia D. Hall*
5. *Apache County Public Fiduciary (Patricia D. Hall)*

4-B: *Interview, review, discussion, and possible action regarding the pending applications for renewal of Jeff Manley.*

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

5-A: *Review, discussion, and possible action regarding request for placement on inactive status received from Rebecca Ginsburg, license number 20423.*

**6) ADMINISTRATIVE ISSUES..... *Division Staff***

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

6-B: *Update regarding closed complaints posted to the Fiduciary webpage.*

6-C: *Nomination and election of the 2015 Fiduciary Board vice chair.*

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

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