

FIDUCIARY BOARD

Meeting Agenda – Thursday, November 5, 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

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).

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 September 10, 2015.

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

2-A: Review, discussion and possible action regarding complaint number 09-0007 involving Stephanie McCollum; and review, discussion and possible action regarding renewal of licensure for Stephanie McCollum.

2-B: Interview, review, discussion and possible action regarding complaint number 12-0004, involving license holder, Entrust Fiduciary Services, Inc.

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

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

- 1. Adam Hansen*
- 2. Custom Care Financial Solutions, LLC (Philip DeVico)*
- 3. Gregory Loughridge*
- 4. Matthew Scott Dana*

4) RENEWAL OF LICENSURE APPLICATIONS..... *Division Staff*

4-A: Review, discussion and possible action regarding the following pending application for renewal of individual fiduciary licensure:

James Clark

5) LICENSURE AND ELIGIBILITY.....*Division Staff*

5-A: Review, discussion, and possible action regarding the request of Yvonne (Bonnie) Navarro-Stallings to retake the fiduciary examination.

5-B: Review, discussion, and possible action regarding request of license holder, Debra Eazer #20575, to place her license on inactive status.

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

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