

FIDUCIARY BOARD

Meeting Agenda – Thursday, January 14, 2016

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 ORDERDeborah 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 5, 2015.

1-B: Review, discussion and possible action regarding the regular session minutes of the meeting held on November 17, 2015.

2) PENDING COMPLAINTS..... Division Staff

2-A: Review, discussion and possible action regarding complaint number, 14-0010 involving Donna Allison-Howard.

2-B: Review, discussion and possible action regarding complaint number, 15-0006 involving Phyllis Cornell.

2-C: Review, discussion and possible action regarding complaint number, 14-0006 involving Denise Shepherd.

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

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

- 1. Ernesto Echeverria*
- 2. Janie Stover*
- 3. Ayudando Alpha, Inc. (Brad Torch)*

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:

Scott Whitney

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

5-A: Review, discussion, and possible action regarding request for placement on inactive status received from the following licensed fiduciaries:

- 1. Natalie Hyde, license number 20706*
- 2. Vanessa Ratliff, license number 20742*

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

6-A: Review, discussion and possible action regarding the certification renewal application deadline pursuant to Arizona Code of Judicial Administration § 7-201 (G)(2).

6-B: Discussion and possible action concerning random audits of continuing education compliance for renewal.

CALL TO THE PUBLIC *Deborah Primock, Chair*

ADJOURN *Deborah Primock, Chair*