

# FIDUCIARY BOARD

Meeting Agenda - Thursday, October 9, 2008

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:30 a.m. - 1:30 p.m. in Conference Room 109

General Inquiries Call: (602) 452-3378 (Certification and Licensing Division Line)

Members of the Public May Attend Meeting in Person

## AGENDA

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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)(5)(b), (c) and (g).

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**CALL TO ORDER** .....*Shari Tomlinson, Chair*

**1) REVIEW AND APPROVAL OF MINUTES**.....*Division Staff*

*1-A: Discussion, review, and possible approval of the Regular Session Minutes of the meeting held on July 10, 2008.*

*1-B: Discussion, review, and possible approval of the Regular Session Minutes of the meeting held on September 11, 2008.*

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

*2-A: Review, discussion and possible action regarding the Superior Court Special Action ruling [case number LC2007-000748-001-DT] involving complaint number 03-0010 and certificate holders Richard Vanderheiden and the Maricopa County Public Fiduciary Office.*

*2-B: Formal Interview with certified fiduciaries Richard Vanderheiden and the Maricopa County Public Fiduciary Office and possible action regarding complaint number 07-0004.*

*2-C: Review discussion, and possible action regarding complaint number 08-0001 involving certificate holder Candace Bow.*

**3) CERTIFICATION AND ELIGIBILITY**.....*Division Staff*

*3-A: Review, discussion, and possible action regarding pending renewal application of Candace Bow.*

3-B: *Review, discussion, and possible action regarding pending renewal application of Clare Guthrie.*

3-C: *Review, discussion, and possible action regarding pending applications for 2008-2010 certification renewal:*

*Janice Kulp  
Fiduciary Services, LLC (Janice Kulp)*

3-D: *Review, discussion, and possible action regarding Voluntary Surrender request received from inactive certified fiduciary Barbara Middleton, certificate number 20505.*

3-E: *Review, discussion, and possible action regarding Voluntary Surrender request received from inactive certified fiduciary Barbara Gomez, certificate number 20537.*

**4) ADMINISTRATIVE ISSUES.....*Division Staff***

4-A: *Update regarding status of recruitment for vacant Board positions.*

4-B: *Review, discussion, and possible action regarding proposed amendments to Arizona Code of Judicial Administration § 7-202.*

**CALL TO THE PUBLIC .....*Shari Tomlinson, Chair***

**ADJOURN .....*Shari Tomlinson, Chair***