

FIDUCIARY BOARD

Meeting Agenda - Thursday, September 13, 2007

Arizona Supreme Court -1501 West Washington Street
Phoenix, Arizona 85007 – 12.00 noon - 4 00 p m in Conference Room CLD1
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)(5)(b) and (c).

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 August 9, 2007

2) PENDING COMPLAINTS *Division Staff*

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

*07-0001 – Melissa Liebe
07-0010 – Lisa Peake*

2-B Formal Interview with certified fiduciary Donna Allison-Howard and possible action regarding complaint number 06-0007

2-C Review, discussion, and possible action regarding Hearing Officer Andrew Marshall's Recommendation Report involving certified fiduciary Richard Vanderheiden, the Maricopa County Public Fiduciary's Office and complaint number 03-0010

2-D Report regarding and possible action involving complaint dismissed by Division Director, pursuant to Arizona Code of Judicial Administration § 7-201 (D)(4)(a) and (H)(2)(b)

Complaint Number 07-0018

2-E Formal Interview with Donna Dauenhauer regarding complaint numbers 01-0029, 02-0035, and 04-0022

3) CERTIFICATION AND ELIGIBILITY *Division Staff*

- 3-A *Review, discussion, and possible action regarding pending applications for Standard certification submitted by*

Elizabeth A Kizer
Laurie Kuzdal
East Valley Fiduciary Services, Inc
- 3-B *Interview with and possible action regarding applicant Beverly Gloden*
- 3-C *Review, discussion, and possible action regarding Inactive Status request received from certified fiduciary Donald Foster, certificate number 20114*
- 3-D *Review, discussion, and possible action regarding Voluntary Surrender request received from certified fiduciary Carl Wohlgemuth, certificate number 20511*
- 3-E *Review, discussion, and possible action regarding Voluntary Surrender request received from certified fiduciary William Dettelback, certificate number 20459*
- 3-F *Review, discussion, and possible action regarding request received from Marco A Zamora requesting the Board to waive ACJA § 7-201 subsection (E)(1)(f)(2)(b)(iv) requirement and allow Mr Zamora to retake the examination pass the 90 days of the date of the notice of the examination results sent to him on July 27, 2007*

4) ADMINISTRATIVE ISSUES . . . *Shari Tomlinson, Chair*

- 4-A *Review and discussion regarding Arizona Supreme Court Rule 31 regarding use of designations likely to induce others to believe a person or entity are authorized to engage in the practice of law*
- 4-B *Report of the Fiduciary Duties Subcommittee*
- 4-C *Report of the POA Subcommittee*

CALL TO THE PUBLIC *Shari Tomlinson, Chair*

ADJOURN *Shari Tomlinson, Chair*