

FIDUCIARY BOARD

Meeting Agenda - Thursday, May 10, 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

AMENDED

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 OF PENDING COMPLAINTS.....*Division Staff*

1-A: Review of complaints dismissed by Division Director, pursuant to Arizona Code of Judicial Administration § 7-201 (D)(4)(a) and (H)(2)(b):

Complaint Number 07-0007

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

2-A: Review, discussion, and possible action regarding potential Arizona Code of Judicial Administration § 7-201 (D)(5)(c)(1)(a) Board recommendations to the Arizona Supreme Court regarding issues related to the fiduciary profession; including (1) fiduciary authorities gained through execution of Powers of Attorney, Trusts, and other means, (2) conflicts of interest, and (3) education requirements for certification eligibility.

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

3-A: Review of pending applications for Standard certification.

*Martin Zachreson
Diane Fuller
Harvey Van Sciver
Eileen Rogers
Arizona Guardians & Conservators (Candace Bow)
Beverly Gloden*

3-B: *Review, discussion, and possible action regarding request received from Marco 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 February 7, 2007.*

CALL TO THE PUBLIC *Shari Tomlinson, Chair*

ADJOURN *Shari Tomlinson, Chair*