

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda - Monday, January 29, 2007

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:00 a.m. - 2:00 p.m. in Conference Room 230

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*Judge Roland Steinle, Chair*

1) REVIEW AND APPROVAL OF MEETING MINUTES.....*Judge Roland Steinle, Chair*

1-A: Executive Session Minutes for the meeting of October 16, 2006.

1-B: Regular Session Minutes for the meeting of November 13, 2006.

1-C: Regular Session Minutes for the meeting of December 4, 2006.

1-D: Regular Session Minutes for the meeting of December 18, 2006.

2) CERTIFICATION AND ELIGIBILITY*Division Staff*

2-A: Review of pending requests for continuing education credit approval.

2-B: Review, discussion, and possible action regarding denial of business entity certification for applicant American Living Trust Services, LLC.

2-C: Review, discussion, and possible action regarding Hearing Officer David Pennartz' Recommendation Report regarding the denial of business entity certification involving Steele Larson Anderson Legal, LLC.

2-D: Review, discussion, and possible action regarding Hearing Officer Richard Goldsmith's Recommendation Report and Amended Recommendation Report regarding the denial of renewal of certifications involving Barbara Morejon and Immigration Assistance Center, LLC.

3) REVIEW OF PENDING COMPLAINTS*Division Staff*

3-A: Review, discussion, and possible action regarding complaint number 05-L099 involving Richard Rochford.

3-B: *Review, discussion, and possible action regarding Board ordered re-hearing involving Steven Wyner and complaint numbers 05-L055, 05-L059, and 05-L071.*

3-C: *Review, discussion, and possible action regarding the following complaints:*

- *03-L033 – Robert Pilkington*
- *04-L038 – Robert Pilkington*
- *04-L046 – Robert Pilkington*
- *04-L059 – Robert Pilkington*
- *04-L068 – Robert Pilkington*
- *06-L110 – Ryan Gibson*
- *06-L111 – Darla Winters*

3-D: *Review, discussion, and possible action regarding complaint numbers 04-L011, 04-L069, and 05-L067 involving a possible Consent Agreement with certificate holder Sandra Coffman.*

4) REVIEW OF CERTIFICATION APPLICATIONSDivision Staff

4-A: *Review, discussion, and possible action regarding pending applications for Standard certification.*

CALL TO THE PUBLICJudge Roland Steinle, Chair

ADJOURNJudge Roland Steinle, Chair

PENDING APPLICATIONS FOR 2006-2007 STANDARD CERTIFICATION: *The following applications for Individual and Business Entity Certification have been submitted and will be considered by the Board at this meeting:*

- Lisa Tonge
- Mabel Foster
- David Hoyt
- Evelyn M. Houston
- Patricia Coronado
- Thomas Steele
- Document Preparation Services, LLC (Barbara Watson Ledger)
- Document Preparation Specialist, LLC (Mary Lungo)
- Joanne Ingram
- Gary Moser
- Toni Glennon
- Robert Beck
- Julia E. McClure
- Alfred G. Madrid