

# BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda - Monday, February 26, 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

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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) and (c).

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**CALL TO ORDER .....***Judge Roland Steinle, Chair*

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

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

*1-B: Regular and Executive Session Minutes for the meeting of January 29, 2007.*

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

*2-A: Review, discussion, and possible action regarding settlement of formal disciplinary action in complaint number 05-L020 involving certificate holder Paul Brown.*

*2-B: Review, discussion, and possible action regarding the following complaints:*

- 04-L006 – AAA Legal Services, Inc.*
- 06-L102 – AAA Legal Services, Inc.*
- 06-L119 – AAA Legal Services, Inc.*

*2-C: 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-L002*

*Complaint Number 07-L003*

*Complaint Number 07-L004*

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

*3-A: Interview with and possible action regarding applicant Gary Moser.*

*3-B: Interview with and possible action regarding applicant Joanne Ingram.*

- 3-C: *Review of pending requests for continuing education credit approval.*
- 3-D: *Review, discussion, and possible action regarding request of potential applicant Lynn Sorce regarding eligibility for certification.*
- 3-E: *Review, discussion, and possible action regarding proposed Findings of Facts and Conclusions of Law involving Barbara Morejon and Immigration Assistance Center, LLC regarding denial of renewal of certification.*
- 3-F: *Review, discussion and possible action regarding request to retake the LDP Examination submitted by Blanca Cornejo.*
- 3-G: *Review, discussion, and possible action regarding Consent Agreement to certify applicant Alfred Madrid.*

**4) REVIEW OF CERTIFICATION APPLICATIONS .....Division Staff**

- 4-A: *Review, discussion, and possible action regarding pending applications for Standard certification.*
- 4-B: *Review, discussion, and possible action regarding Business Entity Exemption Request submitted for applicant Strategic Points Document Preparation, PLLC (Lisa K. Tonge).*

**CALL TO THE PUBLIC .....Judge Roland Steinle, Chair**

**ADJOURN .....Judge 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:*

Strategic Points Document Preparation, PLLC (Lisa K. Tonge)  
 Amanda J. Beren  
 Jerry Thomas  
 John Dawson  
 Amanda L. Murray  
 Salvator Contreras  
 The Getzen Group, Inc (Richard J. Getzen)  
 Richard J. Getzen  
 Joanne Ingram  
 Alfred Madrid  
 Gary Moser