

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda § Monday, May 24, 2004

Arizona Supreme Court § 1501 West Washington Street

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

General Inquiries Call: (602) 364-2378 (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, Code Section '1-202(C)(5)(b)and (c).

CALL TO ORDERJudge Steinle, Chair

REVIEW AND APPROVAL OF MEETING MINUTES.....Judge Steinle, Chair

< *Regular and Executive Session Minutes from April 26, 2004.*

ADMINISTRATIVE ISSUESLinda Grau

< *Review and discussion of adoption of policy addressing denied applicants filing subsequent applications for certification determination.*

< *Discussion regarding the June 21, 2004 Arizona Judicial Council update regarding the Legal Document Preparer Program LDP Program.*

< *Discussion regarding AZCLDP contact with Court Staff.*

< *Discussion regarding Board appointed designee to sign documents on behalf of the Board of Legal Document Preparers in the absence of the Chair.*

CERTIFICATION AND ELIGIBILITYLinda Grau

< *Review of Hearing Officer Report and Recommendation regarding Cicero Cast'On.*

< *Review of Hearing Officer Report and Recommendation regarding Lisa Elwess (aka Lisa*

Crocker).

- < *Report and recommendations regarding Continuing Education course credit approval.*
- < *Certificate holders request for review of Continuing Education Policy regarding credit for course taken during after the renewal deadline and before the new certification period begins on July 1, 2004.*
- < *Report regarding status of pending Consent Agreement with Leah Keller (AZCLDP #80128).*
- < *Review regarding status of AZCLDP examination development and discussion regarding testing locations.*

REPORT REGARDING PENDING COMPLAINTS..... Linda Grau

- < *Review and status update regarding the pending Petition for Cease and Desist Order re: Lisa Crocker (aka Lisa Elwess).*

REVIEW OF INITIAL APPLICATIONS Linda Grau

REVIEW OF APPLICATIONS FOR 2004 RENEWAL.....Linda Grau

CALL TO THE PUBLICJudge Steinle, Chair

ADJOURNJudge Steinle, Chair

PENDING APPLICATIONS FOR INITIAL CERTIFICATION: *The following applications for Individual and Business Entity Initial Certification are scheduled to be reviewed on May 24, 2004.*

- Melissa Tenny
- EMIT, Inc. (Melissa Tenny)
- Safe Split, LLC (Melissa Tenny)
- Ronald Strawn

True North America, Inc. (Ronald Strawn)
Wilson, Keller and Associates, LLC (Leah Keller)
Guadalupe Sapien
Jane Rossi
Central Arizona Paralegal Services, Inc. (Robert Pilkington)
Construction Notice Services, LLC (Penny Drey)
Joann Regan-Dominguez
Financial Security Group of Arizona, Inc. (Joann Regan-Dominguez)

PENDING APPLICATIONS FOR INITIAL CERTIFICATION: *The following applications for Individual Initial Certification have been submitted and are requesting review for certification effective July 1, 2004.*

Joseph Ferrell
Glenda Collings
Collings & Miller Dispute Resolution Services (Glenda Collings)
Patricia Rangel
Mary Pena
Affordable Document Preparation, LLC (Emile Estopare)
Debra Wild
Kristina Cervone
Kelley Dowdle
Rose Paralegal Services, LLC (Ducelinda Ramirez)
Azteka Tax Services (Maria Rodriguez)

BUSINESS ENTITY EXEMPTION REQUESTS: *The following business entities have requested Business Entity Exemption for the 2004 certification period:*

Collings & Miller Dispute Resolution Services (Glenda Collings)
Rose Paralegal Services, LLC (Ducelinda Ramirez)

PENDING APPLICATIONS FOR RENEWAL OF CERTIFICATION: *The following applications for Individual and Business Entity Initial Certification have been submitted and are requesting review for renewal of certification effective July 1, 2004.*

Deborah M. Albert
Donna E. Allison-Howard

Julian A.J. Anderson
Rider Hunt Levett & Bailey Ltd. (Julian Anderson)
Lauri-Beth Anderson
Nancy L. Anderson
Vicky L. Antrim
Kerry-Lynn Armack
Kristina L. Babbitt
Rosalva M.A. Bartz
David Bear
Christiana L. Bennett
Dora Bermudez
The Help Center (Dora Bermudez)
David B.Bishop
Bishops & Associates, LLC (David Bishop)
Mark E. Bluemke
William R. Bowen
Catherine M. Bradley-Hill
Cathey's Docs (Catherine Bradley-Hill)
Scott R. Brannon
James L. Bruce
Lorna Burns
F & M Financial Inc. (Lorna Burns)
Elaine A. Carlton
Jeffrey D. Carr
Christina A. Collura
Karen J. Cooley
Elliot Crosby
Richard D. Dandis
White Mountain Patralegal Services, LLC (Richard Dandis)
Bruce C. Davidson
Davidson Financial Services, LLC (Bruce Davidson)
Carmen B. Davis
National eForms, Inc. (Carmen Davis)
Kathryn B. Demorest
We The People Forms & Service Center of Pima County, Inc. (Kathryn Demorest)
Debra M. Dencek
Michael L. DiCavalcante
Mary Jo Edel
A.D. Scott, Ltd dba PMG Services (Mary Jo Edel)
Thomas S. Emele
Associated Property Management of C.T.D. Inc. (Thomas Emele)
Michele A. Esslinger
Esslinger Enterprises, LLC (Michele Esslinger)

Michael W. Fisher
Western Estate Services (Michael Fisher)
Martin R. Fishgold
Valerie D. Fishgold
Fishgold Financial Services Limited (Valerie Fishgold)
Elizabeth A. Flores
Mirtha A. Fore
William J. Foy
Susana Gallegos
Maria C. Gil
Jemasi, Inc. (Maria Gil)
Julie A. Haigh
Majestic's Paralegal Center
Derek M. Haigh
Teri L. Hale
John W. Hanson
Laura D. Heffron
Suzette M. Hockensmith
Christopher R. Hoyt
Richard C. Hoyt
Richard C. Hoyt Associates, Inc. (Richard Hoyt)
Wanda B. Jack
Statewide Paralegal Services, Inc. (Wanda Jack)
Robert W. Judah
Debra J. Klement
Lori C. Kort
T.F.C.Ventures, Inc. (Lori Kort)
John H. Kroeger
Elaine LaCasella
Frances Langston-Hancock
Langston-Hancock Legal Documents (Frances Langston-Hancock)
Ronald D. Lawson
Marlene F. Leatherwood
Karen M. Lepin
Lepin and Renahan Management Inc. (Karen M. Lepin)
David Lerma
Kimberly K. Lovelace
William T. MacKinnon
Kevin C. Maloney
Fortress, LLC (Kevin C. Maloney)
Christopher F McClory
Darlene E. Merrill
Phoebe W. Merrill
Lorraine B. Miller

Marilynn D. Monda
Karla D. Motsenbocker
Moon Valley Legal Services, Inc. (Karla Motsenbocker)
Penny Murua
Bonnie Ogden
Ogden Services Incorporated (Bonnie Ogden)
Debra Parks
Peoria Nu Start Bankruptcy (Debra Parks)
Joy Partridge
Accounting World CPA's, PLC (Joy Partridge)
Lisa Perez Leon
Leonard J. Perez
Daniel D. Peterson
Dan Peterson Property Management, LLC (Daniel Peterson)
Claudia J. Plotnick
Hua Qin
Michael L. Roberson
Cornerstone Properties, Inc. (Michael L. Roberson)
Jose M. Robledo
Robledo Immigration & Tax Service (Jose Robledo)
Arturo R. Ruiz
Jackie E. Sandoval
George M. Shackelford
Lupita F. Shestko-Montiel
Edward W. Smith
Dawn Snead
Susan Q. Stephenson
Caretaker, Inc. (Susan Stephenson)
Jette Stevens
Stevens Paralegal Services, LLC (Jette Stevens)
Karen D. Strauss
John E. Tencza
American Elder Group, LLC (John Tencza)
Darlene J. Thurman
Jesse V. Torres
Nina Tross
Tross Accounting & Tax Service, Inc. (Nina Tross)
Donna F. Vasquez
Jacqueline M. Vigil
Capital Consultants Management Corporation (Jacqueline M. Vigil)
Carol L. Wells
Blackwood, LLC (Carol Wells)
Eloy Wilson
Allen M. Winder

Susan M. Womack
Cindy Wong

BUSINESS ENTITY EXEMPTION REQUESTS: *The following business entities were previously exempted from 2003 business entity certification and have made application to extend their exemption status into the 2004 certification period:*

Peoria Nu Start Bankruptcy (Debra Parks)
Moon Valley Legal Services, Inc. (Karla Motsenbocker)
Langston-Hancock Legal Documents (Frances Langston-Hancock)
Tross Accounting and Tax Services, Inc. (Nina Tross)
Rider, Hunt, Levett, & Bailey, Ltd. (Julian Anderson)
American Elder Group, LLC (John Tencza)
Blackwood, LLC (Carol Wells)
Dan Peterson Property Management, LLC (Daniel Peterson)
Bishop & Associates, Inc. (David Bishop)
Davidson Financial Services, LLC (Bruce Davidson)
Esslinger Enterprises, LLC (Michele Esslinger)