

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda \$ Monday, December 20, 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 (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, Code Section ' 1-202(C)(5)(b)and (c).

CALL TO ORDERJudge Steinle, Chair

REVIEW AND APPROVAL OF MEETING MINUTESJudge Steinle, Chair

< *Regular and Executive Session Minutes from November 15, 2004.*

ADMINISTRATIVE ISSUESLinda Grau

< *Update and discussion regarding the status of the pending Petition for Cease and Desist Order related to non-certificate holder Lisa Elwess, (aka Lisa Crocker).*

< *Review and discussion of Board role and responsibility.*

< *Review and discussion regarding non-certificate holder cease and desist petition.*

< *Review and discussion of proposed changes to Arizona Code of Judicial Administration § 7-208.*

STATUS REPORT REGARDING 2005 EXAMINATION.....Linda Grau

< *Status Update on 2005 LDP examination development process.*

CERTIFICATION AND ELIGIBILITYLinda Grau

- < *Report and recommendations regarding Continuing Education course credit requests.*
- < *Review of Hearing Officer Michele Iafrate's recommendation regarding the denial of renewal of initial individual certification to Glen Hadley.*

REVIEW OF PENDING COMPLAINTS Linda Grau

- < *Review and discussion regarding Hearing Officer Daniel Jurkowitz's recommendation report regarding Cassandra Bruce.*

REVIEW OF CERTIFICATION APPLICATIONS 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 have been submitted and are requesting review for the 2004-2005 certification period:*

- Michael Anderson
- Glen Duke
- Financial Strategies, Inc. (Michael Anderson)
- Granite Gavel, LLC (Glen Hadley)
- Jeremy Reidy
- Roy Warden
- Christopher Fortier
- Joseph Companik
- Michelle Messmer
- Darla Winters

Gilbert Rodriguez
Miranda Buono-Kashou
Martha Kim
Jack Shaw
Carol Keyt
WebMents, LLC (Carol Keyt)
Laura Cilani
Mary Lou Whitelaw-Hatcher
Eric Schoeller
Gregory Economidis
Miles Fisher
Deanne Cywinski
Southwest Resource Management, Corp. (Minzell Kelly)

BUSINESS ENTITY EXEMPTION REQUESTS: *The following business entity has requested Business Entity Exemption for the 2004-2005 certification period:*

Financial Strategies, Inc. (Michael Anderson)
Andrew C. Sarager, CPA, PC (Andrew Sarager)