

# BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda - Monday, June 11, 2007

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 12:00 p.m. - 1:00 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, § 1-202 (C)(5)(b) and (c).

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

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

*1-A: Review, discussion, and possible action regarding the following complaints:*

*03-L019 – Allen Merrill*

*06-L076 – Allen Merrill*

*05-L062 – Daniel Gray*

*1-B: Review, discussion, and possible action regarding Hearing Officer Andrew Marshall's Recommendation Report regarding Steven Wyner and complaint numbers 2005-L055, 2005-L059, and 2005-L071.*

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

*2-A: Interview with and possible action regarding applicant Patrick Flannery.*

*2-B: Interview with and possible action regarding applicant Lorina Torres.*

*2-C: Interview with and possible action regarding applicant Debra Shaffer.*

*2-D: Review, discussion, and possible action regarding requests for continuing education extensions for the following individuals:*

*Brent Miller*

*Gary Moser*

*2-E Review, discussion, and possible action regarding the request of Cynthia Wood to retake the Legal Document Preparer Examination.*

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

3-A: *Review, discussion, and possible action regarding pending applications for 2007-2009 certification renewal.*

3-B: *Review, discussion, and possible action regarding pending applications for Business Entity Exemption Extensions.*

**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:*

Patrick Flanery  
Lorina Torres  
Debra Shaffer

**PENDING RENEWAL APPLICATIONS FOR 2007-2009 STANDARD CERTIFICATION:** *The following applications for Individual and Business Entity Certification have been submitted and will be considered by the Board at this meeting:*

Michael Anderson  
Sandra Anderson  
Carolyn Aragon-Montgomery  
Cynthia Bowman  
Jodi Brown  
Elaine Carlton  
Aldo Castaneda  
Victoria Cegla  
Walter Chapko  
Edward Daily  
Richard Davis  
Lucinda Diaz  
Emil Estopare  
Cynthia Felton  
Valerie Fishgold  
Mabel Foster  
Joseph Glennon  
Julie Haigh  
Beverly Hall  
Maurie Hall

Robert Hall  
Rochele Hoekstra  
Joanne Ingram  
Carol Keller  
Kathleen Kindred  
Les Krambeal  
Robert Lipsey  
Irene Mayer  
Nadia Meza  
Deborah Moldovan  
Marcia Nolan-Malsack  
Joy Partridge  
Vellia Pina  
Diana Portanova  
Lolita Prescod  
Mary Jo Randall  
Joann Regan  
Betsy Ross-Retchin  
Armando Saenz  
Andrew Sarager  
Kenneth Singer  
Holly Skelton  
Dorothy Sollars  
Eleanor Tarman  
Jesse Torres  
Susan Vasquez  
Chris West  
Karla Wyrostek  
Alejandro Zalazar

### **Businesses**

AAM, LLC (Salina McCarthy)  
Accounting World CPA's, PLC (Joy Partridge)  
Advanced Legal Services (Marwan Sadeddin)  
Affordable Document Preparation, LLC (Emil Estopare)  
Affordable Legal Document Services, Inc. (Carol Keller)  
Americana Services (Vellia Pena)  
Arizona Paralegal Services, Inc. (Deborah Moldovan)  
Ashley Renee Enterprises Corporation (George Preston Parker)  
Business World Tax Specialist, LLC (Joy Partridge)  
Cautela Corporation (Marley Beard)  
Financial Security Group of Arizona, Inc. (Joann Regan)  
Financial Strategies, Inc. (Michael Anderson)  
Fishgold Financial Services Limited (Valerie Fishgold)  
Fosters Paralegal Services, LLC (Mabel Foster)  
Majestic's Paralegal Center (Julie Haigh)

Montgomery & Associates, Inc. (Carol Aragon-Montgomery)  
National Future Benefits Unlimited, Inc. (Robin McElfresh)  
Northcott Bellow and Associates, Inc. (Les Krambel)  
R & R Property Management, LLC (Betsy Ross-Retchin)  
RLH Group (Robert Hall)  
That Paralegal Place, Inc. (Carol Hooven)  
West-Word Services Corp. (Chris West)

**PENDING BUSINESS ENTITY EXEMPTIONS EXTENSION REQUESTS FOR 2007-2009:**

*The following Business Entity Exemption Extension requests have been submitted and will be considered by the Board at this meeting:*

Advanced Legal Services (Marwan Sadeddin)  
Affordable Legal Document Services, Inc. (Carol Keller)  
Cautela Corporation (Marley Beard)  
Financial Strategies, Inc. (Michael Anderson)  
R & R Property Management, LLC (Betsy Ross-Retchin)