

BOARD OF LEGAL DOCUMENT PREPARERS

Meeting Agenda - Monday, November 14, 2005

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) 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 ORDER*Judge Steinle, Chair*

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

- *Regular and Executive Session Minutes from October 24, 2005.*

CERTIFICATION AND ELIGIBILITY*Linda Grau*

- *Review and discussion regarding the Continuing Education Policy.*
- *Report and recommendations regarding Continuing Education course credit requests.*
- *Review and discussion regarding voluntary surrender request of AZCLDP number 80063, Edgar Meza.*
- *Review and discussion regarding Hearing Officer David Pennartz' report and recommendations regarding Michael Disney.*
- *Review and discussion regarding Hearing Officer Kathryn Underwood's report and recommendations regarding Ken Volk.*
- *Review and discussion regarding inquiry from AZCLDP Steven Wyner regarding use of the trade name "Quick and Legal Paralegal Services" in light of prior Board actions.*

REVIEW OF PENDING COMPLAINTS Linda Grau

- *Review and discussion regarding LDP Program complaint numbers 03-L010, 04-L010, 04-L063, 04-L071, 04-L072, 05-L004, 05-L007, 05-L009, 05-L013, 05-L016, 05-L027, 05-L028, 05-L049, and 05-L052.*
- *Review and discussion regarding initiation of LDP Program complaints pursuant to Arizona Code of Judicial Administration § 7-208 (H)(2)(b) regarding AZCLDPs who failed to take the examination prior to the deadline.*
- *Review and discussion regarding initiation of LDP Program complaints pursuant to Arizona Code of Judicial Administration § 7-208 (H)(2)(b) regarding business entity certification compliance.*
- *Review and discussion regarding non-certificate holder complaints NC-007, NC- 008, NC-013, NC-014, NC-015, NC-024, NC-028, NC-030, NC-032, NC-037, NC-038, NC-040, NC-041, NC-042, NC-049, NC-056, NC-058, NC-060, NC-080, NC-084, NC-085, NC-086, NC-090, NC-093, NC-096, NC-099, NC-100, NC-108, NC-109, NC-110, NC-114, NC-115, NC-124, NC-127, NC-128, NC-133, NC-134, NC-135, NC-137, NC-139, NC-142, NC-161, NC-163, NC-169, NC-177, NC-178, NC-210, NC-220, NC-335, and NC-336.*
- *Review and discussion regarding non-certificate holder cease and desist petition pursuant to Arizona Code of Judicial Administration (H)(1)(c).*

REVIEW OF CERTIFICATION APPLICATIONSKimberly Siddall

CALL TO THE PUBLICJudge Steinle, Chair

ADJOURNJudge Steinle, Chair

PENDING APPLICATIONS FOR INITIAL CERTIFICATION: *The following applications for Individual and Business Entity Certification have been submitted and are requesting review for the 2004-2005 certification period:*

Carol Keller
Marty K. Grant
Laura J. Pavey
Laura Tebaqui-Soto
Hasslacher Tax & Financial LLC (John Hasslacher)
John Hasslacher
Income Opportunities LLC (Richard Lorange)

Wendy Byford
Resolutions Solutions, LLC (Scott A. Anderson)
Saddlebrooke Homeowners' Assoc #1 Inc. (John Price)
Erica M. Kloner
Asset Protectors, LLC (Peter Fargo)
Business World Tax Specialist LLC (Joy Partridge)
Carla's Paralegal Services, LLC (Carla Lief)
Jennie M. Rhodes
Deborah Kawa
Paju, Inc. (Paul Brown)
Erin E. Woods
Asset Research Services Inc. (Cheryl M. Thurman)
Cheryl M. Thurman
Gloria H. Moon
Immigration Assistance Center LLC (Barbara Morejon)
Barbara Morejon
Legal-Ease, LLC (Dennis Lawrence)
Diana Nguyen
Kobey, LLC (Ivan Kobey)
Ivan Kobey
Jerrie Ortiz
Simply Legal, Inc (Jody Patterson)
J.C.O. Companies Inc. (John Osselaer)
S.P. Wyner, LLC (Steven Wyner)
Equal Access to the Law, LLC (Rick French)
Dawn Wagoner
Thomas Bojorquez

BUSINESS ENTITY EXEMPTION REQUESTS: *The following business entities have requested Business Entity Exemption or Exemption Extension for the 2005-06 certification period:*

Carla's Paralegal Services, LLC (Carla Lief)
Resolutions Solutions, LLC (Scott A. Anderson)
Income Opportunities LLC (Richard Lorange)
Asset Protectors, LLC (Peter Fargo)
Equal Access to the Law, LLC (Rick French)
Simply Legal, Inc (Jody Patterson)