

# FIDUCIARY BOARD

Meeting Agenda - Thursday, May 22, 2008

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 – 10:30 a.m. - 2:30 p.m. in Conference Room 109

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 .....*Shari Tomlinson, Chair*

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

1-A: *Review, discussion, and possible action regarding pending applications for certification submitted by:*

*Robin Mosness  
Leslie Mann-Damon  
Debra McPherson  
Rena Steele  
Conner Dennison  
Robert Sumners  
John Lloyd  
Condit & Associates, LLC (Mary Jane Condit)*

1-B: *Review, discussion, and possible action regarding pending applications for 2008-2010 certification renewal.*

<i>Charles Arnold</i>	<i>Rhonda Garcia</i>
<i>Alese Barkas</i>	<i>Barbara Gomez</i>
<i>Janice Bernardini</i>	<i>Robert Harner</i>
<i>Leigh Bernstein</i>	<i>H. Rex Hawkins</i>
<i>Katiri Berry</i>	<i>Terry Hill</i>
<i>Daniel Bull</i>	<i>Alexander Hobson</i>
<i>Patricia Carter</i>	<i>Carol Kopsco</i>
<i>Anna Marie Dovico</i>	<i>Sabrina Lamb</i>
<i>Robert Fleming</i>	<i>Frances Lara</i>

*David Osollo  
Linda Petersen  
Dian Pimental  
J.R. Rittenhouse  
Joan Sacramento  
Rashiel Salem  
Vicki Shepard  
Laura Simms  
Patricia Taylor  
Shari Tomlinson  
Peggy Van Norman  
Patricia Weiss  
Candy Wheeler-Ruby  
Walter Bache  
Rashara Badilla  
Jane Berg  
Mary Jane Condit  
Thomas Curti  
Mildred Ellis  
Jane Anne Geisler  
Shellie Hills  
Pamela Johnston  
Carla Jones  
Elizabeth Mulvey  
James Otis  
Gary Pope  
Lisa Price  
Anita Royal  
Diana Serna  
Catherine Yoshida-Corella  
Martha Zanetis  
Irma Caballero  
Candace Bow  
Clare Guthrie  
Clinton Liechty  
Nancy Mueller  
Phyllis Cornell  
Jeffrey Alloway  
Barbara Desmond  
Mary Lander  
Donna Benjamin  
Elizabeth Crosby  
Craig Gordon  
Janice Kulp  
Brian Williamson  
Catherine Robbins*

*Melissa Woodburn  
Susan Villarreal  
Jacqueline Kanaga  
Mark Rubin  
Candace Bow  
John Eadus, II  
Marie Barnett  
Royal Bouschor, II  
James Clark  
Yuma County Public Fiduciary (Candy  
Wheeler-Ruby)  
Northern Arizona Fiduciaries, Inc. (Carla  
Jones)  
Tucson Care Management, Inc (Carmen  
Wilson)  
Rayndon & Associates, PLC (Darra  
Rayndon)  
Pinal County Public Fiduciary (Joan  
Sacramento)  
Apache County Public Fiduciary (Laura  
Simms)  
La Paz County Public Fiduciary (Linda  
Bachtel)  
Entrust Fiduciary Services, Inc. (Lisa Price)  
Mile High Fiduciaries, LLC (Lisa Drutz)  
Sierra Huachuca ARC, Inc (Mario  
Gonzales)  
Ralles Law Firm, P.C. (Mark Ralles)  
Care Coordinators (Peggy Van Norman)  
Mohave Estate Management Office (Rashiel  
Salem)  
Santa Cruz Public Fiduciary (Rita Luz  
Ashford)  
Yavapai County Public Fiduciary (Shari  
Tomlinson)  
Graham County Public Fiduciary (Sherrel  
Lines)  
Managed Protective Services Inc. (Jane  
Anne Geisler)  
Certified Care Management, LLC (Jane  
Berg)  
Jewish Family & Children's Services of  
Southern Arizona (Janie Singer)  
Certified Fiduciary Services, Inc (Pamela  
Johnston)*

*Premier Advocacy & Management Services  
 LLC (Pamela Johnston)  
 Pima County Public Fiduciary (Anita Royal)  
 D.M. Benjamin CPA PC (Donna Benjamin)  
 Yuma Private Fiduciary, L.L.C. (Marie  
 Barnett)  
 Bogutz & Gordon, P.C. (Allan Bogutz)  
 Mohave County Public Fiduciary (Catherine  
 Robbins)  
 Professional Community Services, Inc.  
 (Audrey Hanks)  
 Stewardship Association (Barbara Ficker)  
 Southwest Fiduciary, Inc. (Gregory Devico)  
 East Valley Fiduciary Services, Inc. (James  
 Clark)*

*Fiduciary Services, LLC (Janice Kulp)  
 Fiduciary Solutions, L.L.C. (Mario  
 Martinez)  
 Arc/Guardianship Services Commission  
 (Martha Brightwell)  
 Monarch Fiduciaries, LLC (Melissa Liebe)  
 Conservators of Arizona, Inc. (Michael  
 Klecka)  
 Statewide Community Services, LLC (Peggy  
 Devico)  
 Sun Valley Group, Inc. (Peter Frenette)  
 Carlson and Cooper Certified Fiduciaries  
 (Sally Carlson)*

*I-C: Review, discussion, and possible action regarding request for waiver of continuing education for Craig Gordon.*

**CALL TO THE PUBLIC ..... Shari Tomlinson, Chair**

**ADJOURN .....Shari Tomlinson, Chair**