

FIDUCIARY BOARD

Meeting Agenda - Thursday, July 8, 2010

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

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).

CALL TO ORDER*Kip Anderson, Chair*

1) REVIEW AND APPROVAL OF MINUTES.....*Division Staff*

1-A: Review, discussion, and possible action regarding the Regular Session Minutes of the meeting held on May 13, 2010.

1-B: Review, discussion and possible action regarding the Executive Session Minutes of the meeting held on May 13, 2010.

2) PENDING COMPLAINTS.....*Division Staff*

2-A: Review, discussion and possible action regarding the following complaints dismissed the Division Director pursuant to Arizona Code of Judicial Administration § 7-201(D)(4)(a) and (H)(2)(a):

Complaint number NC09-0016

Complaint Number 10-0005

2-B: Review, discussion and possible action regarding complaint number 07-0027 involving the Arizona Department of Veterans' Services.

3) LICENSE AND ELIGIBILITY.....*Division Staff*

3-A: Review, discussion, and possible action regarding the renewal of licensure for Coyne, Marshall.

3-B: Review, discussion, and possible action regarding the following pending applications for renewal of individual licensed fiduciaries:

1. *Anderson, Samuel*
2. *Ashford, Rita*
3. *Bailey, Debra*
4. *Baldwin, Denise*
5. *Barkas, Alese*
6. *Barkley, John*
7. *Berg, Jane*
8. *Bejamin, Donna*
9. *Bogutz, Allan*
10. *Braun, Pamela*
11. *Brinckerhoff, Frederick*
12. *Brogna, Julianne*
13. *Cannon, Joe*
14. *Carlson, Sally*
15. *Carter, Patricia*
16. *Childers, Donald*
17. *Ciotczyk, Frank*
18. *Clark, James*
19. *Clarke, Diana*
20. *Collins, Carol*
21. *Condit, Mary Jane*
22. *Cooper, Susan*
23. *Cornerll, Phyllis*
24. *Cowley, Janet*
25. *Crosby, Elizabeth*
26. *Drutz, Lisa*
27. *Escalante, Frank*
28. *Espinoza, Patricia*
29. *Ferris, Scott*
30. *Ginsburg, Rebecca*
31. *Gloden, Beverly*
32. *Graham, Ruth*
33. *Grudowski, Joyce*
34. *Guthrie, Clare*
35. *Hall, Glenn*
36. *Hamilton, Linda*
37. *Hanks, Audrey*
38. *Hedger, Elizabeth*
39. *Henderson, Walter*
40. *Herron, Marshall*
41. *Higbee, Julie*
42. *Hills, Shellie*
43. *Holliday, Deborah*
44. *James, Chalmers*
45. *Kellar, Patricia*
46. *Klecka, Michael*
47. *Kohl, Linda*

48. *Kuzdal, Laurie*
49. *Lamb, Sabrina*
50. *Lara, Frances*
51. *Leuthold, Clark*
52. *Lloyd, John III*
53. *Margaretten, Joel*
54. *Martelli, Anna Marie*
55. *Martin, Bruce*
56. *Mejia, Cecilia*
57. *Moriarity, Kathleen*
58. *Nohren, Roger*
59. *Noviello, Joseph*
60. *Olsen, Constance*
61. *Otis, James*
62. *Petersen, Linda*
63. *Powers, Patricia*
64. *Ralles, Mark*
65. *Rea, Estella*
66. *Rubin, Mark*
67. *Sulzer, Gregory*
68. *Thames, Robert*
69. *Thompson, Carol Ann*
70. *Tomlinson, Shari*
71. *Vallely, Dorothy*
72. *Vanderheiden, Richard*
73. *Warner, Gary*
74. *Weiss, Patricia*
75. *Wilke, Harry*
76. *Briggs, Milly Ann*
77. *Dovico, Gregory*
78. *Dovico, Peggy*
79. *Ellis, Mildred*
80. *Espinoza, Mary*
81. *Ficker, Barbara*
82. *Fitzsimmons, Tamarah*
83. *Frenette, Heather*
84. *Frenette, Petter*
85. *Hawthorne, Michael*
86. *Hobson, Alexander*
87. *Kruger, Richard*
88. *Lander, Mary*
89. *Langen, William*
90. *McCollum, Stephanie*
91. *McKee, Debra*
92. *Mitchell, Mark*
93. *Polk, Jay*
94. *Rednour, Carrie*

95. Reid, Linda
96. Simpson, Sally
97. Steele, Rena
98. Villarreal, Susan
99. Walters, Dawn
100. Westra, F.M.
101. Whitfield, Theresa
102. Woodburn, Melissa
103. Wright-Gordon, Robin
104. Yoshida-Corella, Catherine
105. Coventry, Roger
106. Garza, Nora
107. Sacramento, Joan
108. Flores, Patricia
109. Appel, Fred
110. Lane, Tommy
111. Boen, Tracy
112. Briggs, Raymond
113. Patterson, Shaw

3-C: *Review, discussion, and possible action regarding Voluntary Surrender request received from the following licensed fiduciaries:*

*Berry, Katiri A.
Van Sciverv, Jr. Harvey
Williamson, Brian*

3-D: *Review, discussion, and possible action regarding Consent Agreements for the following licensed fiduciaries:*

*Bache, Walter
Serna, Diana
Walker, Stephanie
Muller, Nancy*

3-E: *Review, discussion, and possible action regarding renewal of business entities:*

1. *Arizona Department of Veteran Services (Gregory Sulzer)*
2. *Bogutz & Gordon, P.C. (Allan Bogutz)*
3. *Certified Care Management, LLC (Jane Berg)*
4. *Certified Fiduciary Services, Inc. (Pamela Johnston)*
5. *Childers & Berg, LLC (Donal Childers)*
6. *Cochise County Public Fiduciary (Vicki Haviland)*
7. *Coconino County Public Fiduciary (Patricia Powers)*
8. *Condit & Associates, LLC (Mary Jane Condit)*
9. *Conservators of Arizona, Inc. (Michael Klecka)*
10. *D. M. Benjamin CPA, PC (Donna Benjamin)*

11. *East Valley Fiduciary Services, Inc. (James Clark)*
12. *Entrust Fiduciary Services, Inc. (Lisa Price)*
13. *Geriatric Assessment Management & Solutions LLC (Pamela Braun)*
14. *Integrated Care Management Fiduciary (Elizabeth Crosby)*
15. *Maricopa County Public Fiduciary (Susan Cooper)*
16. *Mesch, Clark & Rothschild (Mark Rubin)*
17. *Mile High Fiduciaries, LLC (Lisa Drutz)*
18. *Professional Community Services, Inc. (Audrey Hanks)*
19. *Ralles Law Firm, P.C. (Mark Ralles)*
20. *Rayndon & Associates, PLC (Derra Rayndon)*
21. *Santa Cruz Public Fiduciary (Rita Ashford)*
22. *Yavapai County Public Fiduciary (Shari Tomlinson)*
23. *Apache County Public Fiduciary (Laura Simms)*
24. *Greenlee County Public Fiduciary (Nora Garza)*
25. *Northern Arizona Fiduciaries, Inc. (Carla Jones)*
26. *NRM Resource Management (Rosemerrie Christie)*
27. *Pima County Public Fiduciary Office (Anita Royal)*
28. *Pinal County Public Fiduciary (Joan Sacramento)*
29. *Southwest Fiduciary, Inc. (Gregory Dovico)*
30. *Statewide Community Services, LLC (Peggy Dovico)*
31. *Stewardship Association (Barbara Ficker)*
32. *The Sun Valley Group, Inc. (Peter Frenette)*

4) REVIEW OF LICENSE APPLICATIONS.....Division Staff

4-A: *Review, discussion, and possible action regarding the following pending applications for initial licensure:*

1. *Fromkes, Liza*
2. *McCoy, Sean*
3. *Murray, Jennifer*
4. *Tittlback, Kurt*
5. *Arellano, Silvia*

4-B: *Review, discussion, and possible action regarding the following pending applications for business licensure:*

Four Peaks Fiduciary Services, LLC (Linnea Grooms)

CALL TO THE PUBLICKip Anderson, Chair

ADJOURNKip Anderson, Chair