

THE ARIZONA
Fiduciaries
Association

Board of Directors Nominations Form

Deadline for Submission: September 4, 2020

All AFA Board of Director applicants/nominees, must be a resident of the State of Arizona, a fiduciary licensed and in good standing with the Arizona Supreme Court, and a full member of the Arizona Fiduciaries Association.

If applying for yourself, please complete the entire form below. If you are nominating someone else, please complete the contact information section and use Question #1 to state why you feel the person you are nominating should serve on the AFA Board of Directors.

Name: Lina G. Garcia

Title: Deputy Director

Organization/Company Name: Maricopa County Public Defender

Address: 620 W Jackson Ste 4015, Phoenix, AZ 85003

[REDACTED]

[REDACTED]

Email: Lina.Garcia@maricopa.gov

1. In general, why do you wish to be a member of the AFA Board of Directors?

I feel my background in the banking and legal industries, combined with my experience as a lawyer in the public sector and with the public fiduciary is a unique combination that makes me well-suited for this role. The population served by fiduciaries is important to me, and the AFA is an organization that can make a significant difference in maintaining, setting and improving standards of the industry through best practices, trainings and ongoing dialogue within the profession.

The AFA is the organization best positioned to impact the quality and reputation of the fiduciary community for the State. There is an opportunity to blend the national standards and state statutes to develop a leading philosophy for the licensed fiduciaries of AZ.

From May 2019-June 2020 I served as the Public Fiduciary for Maricopa County. Though a career opportunity changed my day job, the entirety of my career demonstrates my commitment to the indigent and the vulnerable. My desire to serve the public is not confined to work hours and I welcome the opportunity to make a difference for the fiduciary sector as a member of the AFA.

2. Each Director may only have 3 unexcused absences from the Board of Director meetings in any fiscal year. Will you be able to regularly attend and actively participate in the monthly AFA Board of Director's meetings and the annual retreat (typically held in May)?

Yes No

3. Are you willing and able to participate in the AFA's committees to help further its education, membership, and fiscal viability goals?

Absolutely. I would love to see membership in the AFA increase to be more inclusive of those working in the public sector. While I served as the director for the public fiduciary, I re-established lines of communication and a more structured relationship between the AZ directors. We began monthly meetings and held a combined day-long training for all public fiduciaries. I saw how needed this was for all offices in the state and I believe there is a great opportunity for the AFA to extend its reach and further the education and leadership to benefit the fiduciary sector for the state. As a practicing attorney, I see the benefits of a leading organization to help a sector move in the same direction. The State Bar and the Maricopa County Bar both set the tone for practice in the jurisdiction. The AFA absolutely has the potential to do the same for our AZ fiduciaries. Similarly, the local organizations I belong to, such as the AZ Public Defender Association, ASU Los Diablos and Los Abogados, all are very engaged in creating trainings, setting up mentoring opportunities and generally leading discussions that move their respective industries forward.

It can be time-consuming, yet feel slow-moving, to further these areas. It is a lot of work to build programs and develop opportunities and quality trainings. I recognize that and am committed to taking on anything I can do to further organizations whose work ultimately impacts the most vulnerable population in our community in a positive way.

4. Please check any of the committee(s) on which you would be interested in serving.

- Membership
- Education/ Conference
- Conference Planning
- Policy & Procedures

I have several years of experience in developing educational courses for staff, lawyers and fiduciaries. While working for the county I have developed at dozens of training opportunities on topics ranging in size from several dozen to over 100. The format has

also varied from brown bags to virtual settings. Similarly, I am comfortable planning conferences and have worked as part of a team to plan internal conference style trainings for audiences from 30-100+ as well as an annual statewide conference with 1400 attendees. In the various positions held over the last 10 years, I have been tasked with creation and revision of numerous policy/practice and procedure. Though the topic tends to be dry, it helps establish best practices and consistency. As a member of the board, committee work is important, and I welcome the opportunity to help where needed.

5. Please identify any affiliations, memberships, and accreditations which may also be pertinent for AFA leadership.

AFA Member
Licensed AZ Fiduciary
Licensed AZ Attorney

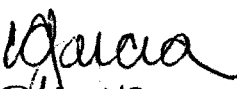
6. Are you aware of any conflicts of interest, either personally or professionally, that would not allow you to fully and effectively serve the AFA as a Board member?

Yes No

If yes, please explain:

As a Director you must become familiar and comply with the AFA Bylaws, the NGA Standards of Practice, and the Arizona Licensed Fiduciary Code of Ethics as stated in ACJA §§7-201 and 7-202. On average a general AFA Board Director should plan on dedicating 2-5 hours a month to fulfill their commitment.

If elected, the undersigned is willing to fulfill the above listed commitments and provide his or her time, energy, and skills to achieve the mission and purpose of the AFA. By signing below the undersigned hereby confirms he/she is a fiduciary licensed by, and in good standing with, the Arizona Supreme Court and is a current full member of the Arizona Fiduciaries Association.

Signature 
Date 09/10/2020

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Questions? Contact Pam Carlson at 520.338.0840