

About Us

Northern Arizona Fiduciaries, Inc. (NAF), located in downtown Prescott, Arizona is a leading provider of private fiduciary services in Northern Arizona.

Incorporated in 1988, NAF was the first private fiduciary in Northern Arizona, providing outstanding service to Yavapai County's vulnerable community.

Carla M. Jones, Owner, President, and Principal Licensed Fiduciary has been in the fiduciary field since 1998. She is a registered guardian with the National Guardianship Association, a member of the Arizona Fiduciaries Association and an approved court-investigator for Yavapai County, Arizona. Please visit our website for a comprehensive description of services and updates.

northernarizonafiduciaries.com



Client Services

- **GUARDIAN:** A guardian is someone who is appointed by the court to make decision for a minor or an incapacitated person. A.R.S. §14-1201(23)

- **CONSERVATOR:** A conservatorship is a protective proceeding wherein the authority over the assets and income of an individual become necessary because the individual cannot effectively manager his or her estate. A.R.S. § 14-5401

- **POWER OF ATTORNEY:** A Medical, Financial, Mental Health power of attorney is a document used by an individual, known as the principal, to give another individual, known as the principal's agent, the ability to make decisions on the principal's behalf. A.R.S. § 14-5501 (D)

- **PERSONAL REPRESENTATIVE/ ESTATE ADMINISTRATION:** A personal representative must qualify by filing with the appropriate court any required bond, a statement of acceptance of the duties of the office, A.R.S. § 14-3601. By accepting appointment, a personal representative submits personally to the jurisdiction of the court in any proceeding related to the estate. A.R.S. § 14-3602

- **TRUSTEE/SUCCESSOR TRUSTEE:** An Arizona trustee is always under the duty to act in good faith in accordance with the purpose of the trust. A.R.S. §14-10105 (B) (2)

- **EXPERT WITNESS:** A Person who is a specialist in a subject, who may present their expert opinions without having been witness to any occurrence relating to the lawsuit or criminal case.



NORTHERN ARIZONA FIDUCIARIES, INC.

Arizona Supreme Court
License #20198

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AZ Supreme Court
License# 20276

Owner/
Principal Fiduciary
carlajones@nafincaz.com

Licensed, Bonded,
and Registered

Service Commitment

The team of professionals at Northern Arizona Fiduciaries believe that being asked to assist with the care of their clients and their assets is a privilege.

Whether acting as a Guardian, Conservator, Power of Attorney or in another trusted role, we recognize it takes a broad range of skills to effectively service the needs of our clients. It requires more than the typical one-person fiduciary office or more-costly legal office can provide.

We hire talented individuals and provide continuous education to meet and maintain the highest professional standards. Our fiduciaries are licensed by the State of Arizona and are provided with continuous educational opportunities as required by the state. You can find out more about our staff at

northernarizonafiduciaries.com



Consultation Services

- Consulting with family guardian's regarding their duties in appointed capacity.
- Assisting persons in a fiduciary role with a particular task or project to fulfill the requirement of that role, i.e. court inventories, accounting, reports, etc.
- Northern Arizona Fiduciaries, Inc. services may also be retained privately by clients for specific assistance in certain areas. The duties NAF is to provide in these cases may also be defined under the service agreement signed by the client. Services provided are within the scope of general fiduciary requirements under the Arizona Law governing fiduciaries.



Fiduciary Services

- Initial investigation, intake, research, conferences, professional consultations, court sessions, meeting with third party agencies, and review of case history records.
- Recovering and/or assisting various agencies with the recovery of assets if a client/ward/protected person has been a victim of financial exploitation.
- Coordination and monitoring personal care and health services.
- Conducting case management visits to check on the physical, environmental, social and health status of the client/ward/protected person.



Trust Services

- Fiduciary services, asset management, case management on behalf of trust and beneficiaries.
- Administering trust in accordance with Arizona Revised Statutes laws governing trusts and duties of trustee.



Fee Statement

**FEE STATEMENT AND BASIS FOR
COMPENSATION PURSUANT TO
A.R.S. §14-5109**

**PLEASE REFER TO OUR WEBSITE:
NORTHERNARIZONAFIDUCIARIES.COM
FOR A CURRENT FEE SCHEDULE**