

## AGENDA

Meeting of the Elder Law Section of the Colorado Bar Association  
March 15, 2018  
8:30 a.m.

1. Call to Order and Introductions
2. Patrick Flaherty—CBA Executive Director
2. Call for review and approval of March 2018 Minutes
3. Chair’s Report – Letty Maxfield [letty@tealaw.com](mailto:letty@tealaw.com)  
Co-Chair – Arlene Barringer [Arlene@denverprobatelaw.com](mailto:Arlene@denverprobatelaw.com)
4. Treasurer’s Report – Charles Spence [cspence@mbsslip.com](mailto:cspence@mbsslip.com)
5. **Old Business**
  - a. Committee Reports (Chairperson of the committee may report any current matters)
    - i. Civic and Community Affairs Committee:**

Contact/Chair: Sandra Sigler [sandra@zumaltsigler.com](mailto:sandra@zumaltsigler.com)  
Meeting: 1:00 p.m. to 2:00 p.m. – Stratum Room  
Status/Project: Leads fundraising for Senior Law Handbook  
Membership Status: Open to new members
    - ii. CLE and Publications Committee:**

Contact/Chair: Letty Maxfield or Arlene Barringer  
Meeting: None/participation via e-mail  
Status/Project: Looking for CLE Presentations for April  
Membership Status: Open to new members/participants  
March CLE: Starts at 10:00 a.m. – Bill Fender, Innovest Portfolio Solutions LLC, The Uniform Prudent Investor Act: Lessons Learned from 60 Engagements as an Expert Witness
    - iii. Elder Law Retreat:**

Contact/Chair: Susie Germany/Tammy Conover  
[susie@coelderlaw.net](mailto:susie@coelderlaw.net), [tammy@conoverlawllc.com](mailto:tammy@conoverlawllc.com)  
Meeting: 11:15 a.m. – Terrace Conference Room  
Status/Project: The Elder Law Retreat will be held in Vail on August 23-25, 2018.  
Membership Status: Open to new members
    - iv. Medicaid Committee:**

Contact/Chair: Claire Dineen/Sandra Sigler/Rose Zapor/Christopher Brock  
[Claire@dineenlaw.com](mailto:Claire@dineenlaw.com)  
Meeting: Scheduled as needed by Co-Chairs  
Status/Project: Agenda pending  
Membership Status: Looking for new members
    - v. Probate Trial & Procedure Committee:**

Contact/Chair: Tom Rodriguez/Aaron Evans  
[trodriguez@elderlawcolorado.com](mailto:trodriguez@elderlawcolorado.com), [evans@EvansCase.com](mailto:evans@EvansCase.com)  
Meeting: 10:00-11:00 Terrance Conference Room  
Status/Project: Probate Bench Book

Membership Status: Open to new members

**vi. Advanced Legislative Response Team Joint Subcommittee (ALRT):**

Contact/Chair: Spencer Crona/Marco Chayet

[scrona@brownandcrona.com](mailto:scrona@brownandcrona.com) [Marco@coloradoelderlaw.com](mailto:Marco@coloradoelderlaw.com)

Meeting: As needed

Status/Project: Coordinates education and responses to legislative policy matters affecting ELS & T&E

Membership Status: Open to new members

**vii. Office of the Public Guardianship Committee:**

Contact/Chair: Carl Glatstein

[carl@denverprobatelaw.com](mailto:carl@denverprobatelaw.com)

Meeting: via e-mail as needed

Status/Project: Working on getting a Next50 Grant. Looking for letters of support.

Membership Status: N/A

**viii. List Serv Committee:**

Contact/Chair: Sarah Golombek

[sarah@golombeklaw.com](mailto:sarah@golombeklaw.com)

Meeting: via e-mail or in person as needed

Status/Project: Listserv has launched – looking for listserv monitors

Membership Status: Looking for Listserv Monitors

**ix. Mentoring Committee:**

Contact/Chair: Looking for a New Chair

Meeting: Pending

Status/Project: Pending

Membership Status: Pending

Additional Info: Metro Volunteer Lawyers seeking elder law mentors contact Toni-Anne Dasent [tdasent@denbar.org](mailto:tdasent@denbar.org)

**x. Electronic Wills & Remote Notarization Joint Subcommittee:**

Contact/Chair: Herb Tucker/Letty Maxfield

[htucker@wadeash.com](mailto:htucker@wadeash.com) [letty@tealaw.com](mailto:letty@tealaw.com)

Meeting: As needed

Status/Project: Review 2017/2018 draft legislation re remote notarization and draft/consider proposed legislation re electronic wills

Membership Status: Participation welcome, please contact chairs to be added to e-mail distribution list for notice of meetings and materials

Additional Info: Colorado Secretary of State Working Group website link: <http://www.sos.state.co.us/pubs/newsRoom/remoteNotarization/workingGroup.html>.

**xi. Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act Subcommittee:**

Contact/Chair: Catherine Seal/Brooke Brestel

[cas@kirtlandseal.com](mailto:cas@kirtlandseal.com) [brooke@elderlawcolorado.com](mailto:brooke@elderlawcolorado.com)

Meeting: 11:30 – 1:00 p.m. Stratum Conference Room

Status/Project: Review and Comment on Uniform Law Commission draft legislation and propose revisions for consideration in CO adoption  
Membership Status: Open to new participants to assist in reviewing draft legislation

**xii. Subcommittee for Fiduciary Duties & Entities:**

Contact/Chair: Scott Challinor

[scott@conoverlawllc.com](mailto:scott@conoverlawllc.com)

Meeting: Telephonic Meetings – (last meeting October 11th via phone)

Next meeting TBD (e-mail chair for details)

Status/Project: The focus is the need for legal representation by fiduciary entities. Generally, business entities cannot represent themselves in court, but there is an exception for certain closely held entities in cases involving a “controversy” of \$15,000 or less. It is unclear how this applies to fiduciary entities.

Membership Status: Welcoming new committee members

**xiii. Capacity Sorenson Committee:**

Contact/Chair: Tammy Conover

[tammy@conoverlawllc.com](mailto:tammy@conoverlawllc.com)

Meeting: As coordinated (preparing to wind-up committee)

Status/Project: Draft proposed rules, awaiting comments from other CBA Sections

Membership Status: Not actively seeking participation

**xiv. Mandatory Reporting Committee**

Contact/Chair: Kris Zumalt

[kris@zumaltsigler.com](mailto:kris@zumaltsigler.com)

Meeting: As coordinated

Status/Project: TBD

Membership Status: Welcoming committee members

**b. Liaison Reports**

**i. Board of Governors: Marco Chayet**

The next BOG meeting is May 5, 2018.

**ii. Legislative Relations: Jeremy Schupbach**

**iii. Trust and Estate Liaison: Patrick Thiessen**

**iv. SRC Liaison: Nancy Peterson/Mallory Hasbrook/Cate Seal**

**v. Uniform Trust Code: Michael Kirtland**

**vii. CBA Legislative Policy Committee Liaison: Arlene Barringer / Patrick Thiessen**

**viii. NAELA Colorado: Marco Chayet**

**ix. National Guardianship Association/Colorado Guardianship Association: Sarah Golombek**

**ix. AARP Liaison: Dennis Valentine**

**x. CBA Ethics Committee: Michael Kirtland**

**xi. Probate Rules & Forms Committee: Shari Caton/Michael Kirtland/Marcie McMinimee**

**xii. SRC Public Administrator Liaison: Marcie McMinimee**

**xiii. CBA YLD Liaison: Mallory Hasbrook**

**6. New Business and Announcements**

a. Hot Topics

**CLE Presentation**

**Presenter: Norv Brasch, Trust & Estate Associates, "Right to Remain Frozen"**

**Call-In Information**

**1-855-392-2520**

**Access Code: 9017998#**