

**Council of the Trust and Estate Section, Colorado Bar Association**

**Notice of and Agenda for the August 5, 2020 Meeting**

To: Council Members  
Trust and Estate Section of the Colorado Bar Association

From: Molly T. Zwerdlinger  
Secretary/Treasurer  
1901 W. Littleton Blvd.  
Littleton, CO 80120  
(303) 798-2525  
Mzwerdlinger@m-s-lawyers.com

**Notice of Meeting**

The next monthly meeting of the 2020-2021 Council of the Trust and Estate Section of the Colorado Bar Association will be held:

Date and time: ***Wednesday, August 5, 2020, 3:15 p.m.***  
Place: ***THIS MEETING WILL BE CALL-IN ONLY DUE TO COVID 19***

---

**Call-In Instructions**

Call-in instructions are as follows: 1.425.436.6390  
Access Code: 420360

---

**Minutes of Previous Meeting, Financial Reports & Attachments**

1. Minutes of the May 6, 2020 meeting of the Council
2. Financial spreadsheets as of June 29, 2020
3. Real estate template deeds
  - a. Personal Representative's Deed (Distribution)
  - b. Personal Representative's Deed (Sale)
  - c. Trustees Deed (Distribution)
  - d. Trustees Deed (Sale)
  - e. Conservator's Deed
  - f. Beneficiary Deed
  - g. Revocation of Beneficiary Deed
  - h. Deed Reserving Life Estate
  - i. Deed to Different Life Estate and Remainder Grantees
  - j. Supplementary Affidavit
  - k. Affidavit
  - l. Affidavit for Grantee Acting in a Representative Capacity
  - m. Statement of Authority
  - n. Notes on Use

**Trust and Estate Section Council Agenda**  
**August 5, 2020**

In an attempt to adhere to the allotted meeting duration of one (1) hour and thirty (30) minutes, the Chair will exercise his/her prerogative to limit the time for any report or discussion on a topic to ten (10) minutes. This conforms to Robert's Rules of Order.

1. Review/approval of Minutes of the May 6, 2020, meeting of the Council
2. Chair's Report and Administrative Matters (Spencer Crona)
3. Secretary/Treasurer's report (Molly Zwerdinger)
4. Tax Section Liaison (Georgine M. Kryda)
5. Elder Law Section Liaison (Patrick Thiessen)
6. Real Estate Section Liaison (Chad Rounds)
  - a Request for Approval of Deed Templates (David Kirch)
7. Family Law Section Liaison (Kim Willoughby)
8. Statutory Revisions Committee (Lauren DaCunha)
9. Legislative Liaison (Darla Daniel & Steve Brainerd)
10. Council Notes (Kristin Dittus)
11. CLE/Estate Planning Retreat (Tim Bounds)
12. Orange Book Forms Committee (Lisa Hardin)
13. Rules and Forms Committee (Gordon Williams)
14. Civic and Community Affairs Joint Committee of the Elder Law Section (Sandra Sigler)
15. Diversity & Inclusivity Committee (Melissa Schwartz)
16. Probate Trial and Procedures Committee (Kathy Seidel & Norv Brasch)
17. Colorado Estate Planning Handbook (David Johns)
18. Green Book (Josie Faix)
19. Trust & Estate Practice Support Committee (Jennifer Hazelton & William Ellison)

20. The Colorado Lawyer (Emily Bowman)

21. Communications Representative/Ambassador Program (Lindsay Andrew)

22. Board of Governors Representative (Jonathan Haskell)

23. Miscellaneous/FYI

24. Adjournment

**Council of the Trust and Estate Section of the Colorado Bar Association  
Minutes of May 6, 2020, Meeting**

Council met on Wednesday, May 6, 2020 via audio-visual conference due to the ongoing COVID19 situation. The meeting was called to order at approximately 3:20 p.m. by Josie Faix, Chair.

The following members of Council participated by phone and constituted a quorum:

Josie Faix, Chair  
Spencer Crona, Vice Chair  
Tim Bounds, Secretary  
Leia Ursery, Chair Pro-Tem  
Lauren Da Cunha (2<sup>nd</sup> year member)  
Peggy Gardner (2<sup>nd</sup> year member)  
Elizabeth Meck (2<sup>nd</sup> year member)  
Louisa Ritsick (1<sup>st</sup> year member)  
Kristin Dittus (1<sup>st</sup> year member)  
Charles Spence (1<sup>st</sup> year member)

Also in attendance were:

Patrick Thiessen, Elder Law Section Liaison  
Darla Daniel, Legislative Liaison  
Georgine Kryda, Tax Section Liaison and 2020-2021 1<sup>st</sup> year council member  
Chad Rounds, Real Estate Section Liaison  
Lisa Hardin, Orange Book Forms Committee  
Simon Tolbert (2020-2021 1<sup>st</sup> year council member)  
Amy Symons (2020-2021 1<sup>st</sup> year council member)  
Andy White, CBA Legislative Liaison  
Katie Roberts, CBA Staff  
Molly Zwerdinger, Statutory Revisions Committee Chair and 2020-2021 Secretary/Treasurer

**1. Approval of Minutes of Prior Meeting**

The Minutes of the April 1, 2020, Council meeting were approved unanimously.

**2. Chair's Report (Josie Faix)**

Council is continuing to work with the CBA CLE staff on the 2020 Estate Planning retreat. Josie also thanked all outgoing Council members for their service over the past two years.

**3. Secretary/Treasurer Report (Tim Bounds)**

Tim reviewed the financial reports for May 2020 and year-to-date. There have not been any significant changes to the budget month-to-month. There will be a call on May 8<sup>th</sup> to discuss nominees and submissions for the 2020 *Sterling Ambler Award*.

**4. Tax Section Liaison (Georgine M. Kryda)**

Georgine will be the Chair for Tax Section for 2020-2021 year, and will continue to serve as liaison to the T&E Section as well.

**5. Elder Law Section Liaison (Patrick Thiessen)**

The Executive Council of the Elder Law Section met today. The 2020 Elder Law Retreat will be held August 27-29, 2020 but will now be conducted virtually due to health reasons. Executive Council is also seeking a new Vice Chair; please submit nominees directly to Elder Law Section.

Patrick reported that there are proposed regulations regarding disability trusts that will likely be passed by the Colorado Department of Health Care Policy & Financing this month.

Jonathan Culwell is working on a proposal for virtual meetings with clients with mental illness who cannot meet in person with their attorney due to restrictions on visitation imposed by the COVID-19 pandemic.

**6. Real Estate Section Liaison (Chad Rounds)**

Chad reviewed his memorandum regarding the April meeting of the Real Estate Section.

**7. Family Law Section Liaison (Kim Willoughby)**

There was no report from the Family Law Section.

**8. Statutory Revisions Committee (Molly Zwerdlinger)**

The Uniform Fiduciary Income & Principal Act will be taken up by SRC in the upcoming year (2020-2021). Georgine Kryda summarized the work done by her subcommittee on the Act.

**9. Legislative Liaison (Stephen M. Brainerd & Darla Daniel)**

There was no report as the Legislature is not in session due to COVID-19.

**10. Legislative Update (Andy White)**

Andy reported that the Legislature has set a tentative date for reconvening of May 18<sup>th</sup>. This would allow the Legislature to convene for up to 50 days to take up pending items of legislation. Due to the limited timeframe, Andy anticipates that only a portion of the legislative agenda will be addressed during session.

Senate Bill 96 related to remote notarization has been temporarily approved via the Governor's emergency orders due to the COVID-19 pandemic. Remote notarization in a more permanent form is likely to be a priority for the Legislature during the shortened session. The proposed amendments regarding privacy, which are supported by the CBA, are not included in the current version of the Bill.

Senate Bill 129 related to pre-trial conferences in protected proceedings passed unanimously in the Senate prior to the Legislative session being suspended. At this time it is uncertain if the Bill will be taken up during the upcoming temporary session.

**11. Council Notes (Kristin Dittus)**

The next issue of Council Notes will go out on June 15<sup>th</sup>.

**12. Continuing Legal Education & Estate Planning Retreat (Spencer Crona)**

Bridget Moore of CBA CLE reported that programming for the remainder of 2020 will be exclusively virtual due to COVID-19. CBA CLE is working on transitioning upcoming Section retreats to virtual platforms, and Bridgett will be contacting faculty and attendees to address changes to agendas.

**13. Orange Book Forms Committee (Heidi Gassman)**

Orange Book met via Zoom today to continue reviewing engagement letter forms. The Committee will meet via Zoom in June.

**14. Rules & Forms Committee (Gordon Williams)**

There was no report.

**15. Civic & Community Affairs (Sandra Sigler)**

There was no report.

**16. Diversity & Inclusivity Committee (Melissa Schwartz)**

There was no report.

**17. Probate Trial & Procedures Committee (Kathy Seidel & Norv Brasch):**

There was no report.

**18. Colorado Estate Planning Handbook (David Johns)**

There was no report.

**19. Green Book (Josie Faix)**

There was no report.

**20. New T&E Practice Support Committee (Jessica Johnson)**

There was no report.

**21. The Colorado Lawyer (Emily Bowman & David Kirch)**

There was no report.

**22. Communications Representative & Ambassador Coordinator (Lindsey Andrew)**

There was no report.

**23. Board of Governors Representative (Jonathan Haskell)**

There was no report.

**24. Other Business**

There was no new business. The new slate of members for the 2020-2021 Council year introduced themselves. Members and attendees thanked outgoing Chair Josie Faix for her service to the Council.

### **ADJOURNMENT**

The meeting was adjourned at 4:45 p.m. The next Council meeting will be held in August 2020.

Respectfully submitted

/s/ Timothy Bounds, Secretary

## **Trust and Estate Section of the Colorado Bar Association Minutes of Annual Meeting for the Year 2020**

The Annual Meeting of the Trust & Estates Section of the Colorado Bar Association was held on Wednesday, May 6, 2020 via audio-visual conference due to the ongoing COVID19 situation. The meeting was called to order at approximately 2:50 p.m. by Josie Faix, Chair.

In attendance were:

Josie Faix, Chair  
Spencer Crona, Vice Chair  
Tim Bounds, Secretary  
Leia Ursery, Chair Pro-Tem  
Lauren Da Cunha (2<sup>nd</sup> year member)  
Elizabeth Meck (2<sup>nd</sup> year member)  
Kristin Dittus (1<sup>st</sup> year member)  
Charles Spence (1<sup>st</sup> year member)  
Darla Daniel, Legislative Liaison  
Georgine Kryda, Tax Section Liaison and 2020-2021 1<sup>st</sup> year council member  
Chad Rounds, Real Estate Section Liaison  
Simon Tolbert (2020-2021 1<sup>st</sup> year council member)  
Molly Zwerdinger, Statutory Revisions Committee Chair/2020-2021 Secretary/Treasurer  
Katie Roberts, CBA Staff  
David Kirch  
Walter Kelly  
Diana Payne  
Patrick Thiessen  
Oren Limbaugh  
Suzy Nelson  
Colleen Scarola

### **Approval of 2020-2021 Council Slate**

The Section members voted on the proposed 2020-2021 Slate of 1<sup>st</sup> year Executive Council members and the following officer positions: Secretary/Treasurer, and Vice Chairman. The 2020-2021 Slate of 1<sup>st</sup> year members are: Simon Tolbert, Amy Symons, and Georgine Kryda. **A motion was made, seconded and approved regarding the proposed 2020 slate of 1<sup>st</sup> year members.**

The 2020-2021 1<sup>st</sup> year members are: Simon Tolbert, Amy Symons, and Georgine Kryda. Molly Zwerdinger is the Secretary/Treasurer. Tim Bounds is the Vice Chairman. Spencer Crona, current Vice Chair, will be the Chair.

The meeting was adjourned at 3:12 p.m.

Respectfully submitted

/s/ Timothy Bounds, Secretary

 **DRAFT**

**PERSONAL REPRESENTATIVE'S DEED**

(Distribution)

THIS DEED is dated \_\_\_\_\_, and is  
made between \_\_\_\_\_  
as Personal Representative of the Estate of \_\_\_\_\_,  
Deceased, Grantor, and \_\_\_\_\_,  
Grantee[s], whose legal address is \_\_\_\_\_  
of the \_\_\_\_\_ \*County of \_\_\_\_\_, State of \_\_\_\_\_.

WHEREAS, the decedent died on the date of \_\_\_\_\_ and Grantor was duly appointed Personal Representative of said Estate by the \_\_\_\_\_ Court in and for the \_\_\_\_\_ \*County of \_\_\_\_\_ and State of Colorado, Probate No. \_\_\_\_\_, on the date of \_\_\_\_\_, and is now qualified and acting in said capacity.

NOW THEREFORE, pursuant to the powers conferred upon Grantor by the Colorado Probate Code, Grantor does hereby sell,\*\* convey, assign, transfer, and release unto Grantee[s](in joint tenancy),\*\*\* being entitled to distribution, the following described real property situate in the \_\_\_\_\_ \*County of \_\_\_\_\_, State of Colorado:

[Legal Description]

also known by street and number as:  
assessor's schedule or parcel number:\*\*\*\*

With all appurtenances.\*\*\*\*\*

As used herein, the singular includes the plural and the plural the singular.

GRANTOR

\_\_\_\_\_  
\_\_\_\_\_  
as Personal Representative of the Estate of \_\_\_\_\_  
\_\_\_\_\_, Deceased

STATE OF COLORADO

\_\_\_\_\_ \*COUNTY OF \_\_\_\_\_ ss.

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_ by \_\_\_\_\_ as Personal Representative of the Estate of \_\_\_\_\_, Deceased.\*\*\*\*\*

Witness my hand and official seal.  
My commission expires:\*\*\*\*\*

\_\_\_\_\_  
Notary Public

\*If in Denver or Broomfield, insert "City and."

\*\*It is unclear whether the language "sell" is necessary in a personal representative's deed of distribution to preserve its bargain and sale character. It is included in this model deed. It is up to practitioners to decide what their comfort level is for including or excluding the "sell" language.

\*\*\*Strike as required.

\*\*\*\*Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\*\*\*There is some uncertainty regarding whether or not mineral and water rights are "appurtenances." Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\*\*See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\* If the notary stamp does not include the expiration date, the notary should include the date on this line.

 **DRAFT**

**PERSONAL REPRESENTATIVE'S DEED**  
(Sale)

THIS DEED is dated \_\_\_\_\_, and  
is made between \_\_\_\_\_  
as Personal Representative of the Estate of \_\_\_\_\_,  
Deceased, Grantor, and \_\_\_\_\_,  
Grantee[s], whose legal address is \_\_\_\_\_  
of the \_\_\_\_\_ \*County of \_\_\_\_\_, State of \_\_\_\_\_.

WHEREAS, the decedent died on the date of \_\_\_\_\_ and Grantor was duly appointed Personal Representative of said Estate by the \_\_\_\_\_ Court in and for the \_\_\_\_\_ \*County of \_\_\_\_\_ and State of Colorado, Probate No. \_\_\_\_\_, on the date of \_\_\_\_\_, and is now qualified and acting in said capacity.

NOW THEREFORE, pursuant to the powers conferred upon Grantor by the Colorado Probate Code, Grantor does hereby sell and convey unto Grantee[s] (in joint tenancy),\*\* for and in consideration of \_\_\_\_\_ Dollars, (\$ \_\_\_\_\_), the following described real property situate in the \_\_\_\_\_ \*County of \_\_\_\_\_, State of Colorado:

[Legal Description]

also known by street and number as:  
assessor's schedule or parcel number:\*\*\*

With all appurtenances.\*\*\*\*

As used herein, the singular includes the plural and the plural the singular.

GRANTOR

\_\_\_\_\_  
\_\_\_\_\_  
As Personal Representative of the Estate of \_\_\_\_\_,  
Deceased

STATE OF COLORADO

\_\_\_\_\_  
\*COUNTY OF \_\_\_\_\_ ss.

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_ by \_\_\_\_\_ as Personal Representative of the Estate of \_\_\_\_\_, Deceased.\*\*\*\*\*

Witness my hand and official seal.  
My commission expires:\*\*\*\*\* \_\_\_\_\_.

\_\_\_\_\_  
Notary Public

\*If in Denver or Broomfield, insert "City and."

\*\* Strike as required.

\*\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\*\* There is some uncertainty regarding whether or not mineral and water rights are "appurtenances." Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\*If the notary stamp does not include the expiration date, include the date on this line.

 DRAFT

**TRUSTEE'S DEED  
(Distribution)**

THIS DEED is dated \_\_\_\_\_, and is made between \_\_\_\_\_  
as Trustee of the \_\_\_\_\_ Trust dated \_\_\_\_\_,  
Grantor, and \_\_\_\_\_, Grantee[s], whose legal address is \_\_\_\_\_  
of the \_\_\_\_\_ \*County of \_\_\_\_\_, State of \_\_\_\_\_.

NOW THEREFORE, Grantor, as trustee and pursuant to the powers conferred upon Grantor by the Colorado Uniform Trust Code and the trust agreement, as amended from time to time, or other instruments governing the trust, does hereby sell,\*\* convey, assign, transfer, and release unto Grantee[s] (in joint tenancy),\*\*\* being entitled to distribution of the property pursuant to the terms of the Trust, the real property situate in the \_\_\_\_\_ \*County of \_\_\_\_\_ and State of Colorado, described as follows:

[Legal Description]

also known by street address as:  
assessor's schedule or parcel number:\*\*\*\*

With all appurtenances.\*\*\*\*\*

As used herein, the singular includes the plural and the plural the singular.

IN WITNESS WHEREOF, Grantor has executed this deed the date set forth above.

GRANTOR

\_\_\_\_\_  
\_\_\_\_\_  
as Trustee of the \_\_\_\_\_  
Trust, dated \_\_\_\_\_

STATE OF COLORADO  
\_\_\_\_\_ \*COUNTY OF \_\_\_\_\_ ss.

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_,  
20\_\_\_\_\_, by \_\_\_\_\_ as Trustee of \_\_\_\_\_  
Trust dated \_\_\_\_\_,\*\*\*\*\*

Witness my hand and official seal.

\_\_\_\_\_  
Notary Public  
My commission expires:\*\*\*\*\*

\_\_\_\_\_  
Name and Address of Person Creating Newly Created Legal Description (§38-35-106.5, C.R.S.)

\*If in Denver or Broomfield, insert "City and."

\*\* It is unclear whether the language "sell" is necessary in a trustee's deed of distribution to preserve its bargain and sale character. It is included in this model deed. It is up to practitioners to decide what their comfort level is for including or excluding the "sell" language.

\*\*\*Strike if applicable.

\*\*\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\*\*\* There is some uncertainty regarding whether or not mineral and water rights are "appurtenances." Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\*If the notary stamp does not include the expiration date, include the date on this line.

---

 DRAFT

**TRUSTEE'S DEED  
(Sale)**

THIS DEED is dated \_\_\_\_\_, and is made between \_\_\_\_\_  
as Trustee of the \_\_\_\_\_ Trust dated \_\_\_\_\_,  
Grantor, and \_\_\_\_\_, Grantee[s], whose legal address is \_\_\_\_\_  
\_\_\_\_\_ of the \_\_\_\_\_ \*County of \_\_\_\_\_,  
State of \_\_\_\_\_.

NOW THEREFORE, Grantor, as trustee and pursuant to the powers conferred upon Grantor by the Colorado Uniform Trust Code and the trust agreement, as amended from time to time, or other instruments governing the trust, does hereby sell and convey unto Grantee[s] (in joint tenancy),\*\* for and in consideration of \_\_\_\_\_  
DOLLARS, (\$\_\_\_\_), the following described real property situate in the \_\_\_\_\_ \*County of \_\_\_\_\_  
\_\_\_\_\_ and State of Colorado, described as follows:

[Legal Description]

also known by street address as:  
assessor's schedule or parcel number:\*\*\*

With all appurtenances.\*\*\*\*

As used herein, the singular includes the plural and the plural the singular.

**IN WITNESS WHEREOF**, Grantor has executed this deed the date set forth above.

GRANTOR

\_\_\_\_\_  
\_\_\_\_\_  
as Trustee of the \_\_\_\_\_  
Trust, dated \_\_\_\_\_

STATE OF COLORADO

\_\_\_\_\_ \*COUNTY OF \_\_\_\_\_ ss.

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_,  
20\_\_\_\_ by \_\_\_\_\_ as Trustee of \_\_\_\_\_  
Trust dated \_\_\_\_\_,\*\*\*\*\*

Witness my hand and official seal.

\_\_\_\_\_  
Notary Public  
My commission expires:\*\*\*\*\* \_\_\_\_\_

---

Name and Address of Person Creating Newly Created Legal Description (§38-35-106.5, C.R.S.)

\*If in Denver or Broomfield, insert "City and."

\*\*Strike if applicable.

\*\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\*\* There is some uncertainty regarding whether or not mineral and water rights are "appurtenances." Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\* If the notary stamp does not include the expiration date, include the date on this line.

---

CONSERVATOR'S DEED

DRAFT

THIS DEED is dated \_\_\_\_\_, and is made between \_\_\_\_\_ as Conservator of the Estate of \_\_\_\_\_, Protected Person, Grantor, and \_\_\_\_\_, Grantee[s], whose legal address is \_\_\_\_\_ of the \_\_\_\_\_ \*County of \_\_\_\_\_, State of \_\_\_\_\_.

WHEREAS Grantor was appointed as Conservator of the Estate of the Protected Person by the \_\_\_\_\_ Court in and for the \_\_\_\_\_ \*County \_\_\_\_\_, State of Colorado, Case No. \_\_\_\_\_, on \_\_\_\_\_, and is now qualified and acting in said capacity.

NOW THEREFORE, pursuant to the powers conferred upon Grantor by the Colorado Probate Code, Grantor does hereby sell and convey unto Grantee[s] (in joint tenancy)\*\* for and in consideration of \_\_\_\_\_ DOLLARS, (\$ \_\_\_\_\_), the following described real property situate in the \_\_\_\_\_ \*County of \_\_\_\_\_, State of Colorado:

[Legal Description]

also known by street address as:  
assessor's schedule or parcel number:\*\*\*

With all appurtenances.\*\*\*\*

As used herein, the singular includes the plural and the plural the singular.

IN WITNESS WHEREOF, Grantor has executed this deed on the date set forth above.

GRANTOR

\_\_\_\_\_  
\_\_\_\_\_  
as Conservator of the Estate of \_\_\_\_\_  
\_\_\_\_\_, Protected Person

STATE OF COLORADO  
\_\_\_\_\_ \*COUNTY OF \_\_\_\_\_ ss.

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_ by \_\_\_\_\_ as Conservator of the Estate of \_\_\_\_\_, Protected Person.\*\*\*\*\*

Witness my hand and official seal.

---

Notary Public

My commission expires:\*\*\*\*\*

---

---

Name and Address of Person Creating Newly Created Legal Description (§38-35-106.5, C.R.S.)

\*If in Denver or Broomfield, insert "City and."

\*\*Strike if applicable.

\*\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\*\* There is some uncertainty regarding whether or not mineral and water rights are "appurtenances." Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\* If the notary stamp does not include the expiration date, include the date on this line.

---



Witness my hand and official seal.

My commission expires: \*\*\*\*\* \_\_\_\_\_

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Name and Address of Person Creating Newly Created Legal Description (§ 38-35-106.5, C.R.S.)

\*(Note to Assessor and Treasurer: This address is for identification purposes only, all notices and tax statements should continue to be sent to grantor.)

\*\* If in Denver or Broomfield, insert "City and."

\*\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\*\* There is some uncertainty regarding whether or not mineral and water rights are "appurtenances."

Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\*If the notary stamp does not include the expiration date, include the date on this line.

DRAFT

REVOCATION OF BENEFICIARY DEED

(§§15-15-401, et seq., Colorado Revised Statutes)
CAUTION: THIS REVOCATION MUST BE RECORDED PRIOR TO THE DEATH OF THE GRANTOR IN ORDER TO BE EFFECTIVE.

\_\_\_\_\_, as Grantor, hereby REVOKES all previously executed beneficiary deeds concerning the following described real property located in the \_\_\_\_\_
\*County of \_\_\_\_\_, State of Colorado:

[Legal Description]

also known by street address as: \_\_\_\_\_
assessor's schedule or parcel number:\*\* \_\_\_\_\_

With all appurtenances.\*\*\*

Executed on \_\_\_\_\_ (date).

\_\_\_\_\_  
Grantor

STATE OF COLORADO )
) ss.
\*COUNTY OF \_\_\_\_\_ )

The foregoing instrument was acknowledged before me on \_\_\_\_\_, 20\_\_\_\_ by \_\_\_\_\_
\*\*\*\*

Witness my hand and official seal.

My commission expires:\*\*\*\*\* \_\_\_\_\_

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Name and Address of Person Creating Newly Created Legal Description (§38-35-106.5, C.R.S.)

\*If in Denver or Broomfield, insert "City and."

\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\* There is some uncertainty regarding whether or not mineral and water rights are "appurtenances."

Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\*If the notary stamp does not include the expiration date, include the date on this line.

 DRAFT

DEED RESERVING LIFE ESTATE

Grantor, \_\_\_\_\_, for the consideration of \_\_\_\_\_  
DOLLARS, (\$ \_\_\_\_\_), in hand paid, hereby sells and conveys unto \_\_\_\_\_,  
Grantee[s], whose legal address is \_\_\_\_\_,  
of the \_\_\_\_\_ \*County of \_\_\_\_\_, State of \_\_\_\_\_ \*\*, (in joint  
tenancy), \*\*\* the following described real property, reserving a life estate to Grantor in and to the same real property and  
appurtenances, \*\*\*\* situate in the \_\_\_\_\_ \*County of \_\_\_\_\_ and State of Colorado, to wit:

[Legal Description]

also known by street address as:  
assessor's schedule or parcel number:\*\*\*\*\*

As used herein, the singular includes the plural and the plural the singular.

GRANTOR, in making this grant, reserves to Grantor the sole use, control, benefit, and income of the described real  
property, including without limitation the appurtenances, \*\*\*\* during Grantor's lifetime.

[GRANTOR] OR [GRANTEES], shall pay for maintenance, repairs, taxes, insurance, mortgage, and assessments  
during Grantor's lifetime.

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

GRANTOR

\_\_\_\_\_  
[GRANTOR'S NAME]

STATE OF COLORADO )  
 ) ss.  
\_\_\_\_\_ \*COUNTY OF \_\_\_\_\_ )

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_  
by \_\_\_\_\_ \*\*\*\*\*

Witness my hand and official seal.  
My commission expires:\*\*\*\*\*

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Name and Address of Person Creating Newly Created Legal Description (§38-35-106.5, C.R.S.)

\*If in Denver or Broomfield, insert "City and."

\*\*Update the address in the conveyance if Grantees are not paying property taxes during Grantor's lifetime.

\*\*\*Strike as required.

\*\*\*\* There is some uncertainty regarding whether or not mineral and water rights are "appurtenances." Generally, mineral rights are not considered "appurtenances" and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be "appurtenant." Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.

\*\*\*\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

\*\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.

\*\*\*\*\*If the notary stamp does not include the expiration date, include the date on this line.

---

**DRAFT**

**DEED TO DIFFERENT LIFE ESTATE AND REMAINDER GRANTEES**

Grantor, \_\_\_\_\_, for the consideration of \_\_\_\_\_  
\_\_\_\_\_ DOLLARS, (\$ \_\_\_\_\_), in hand paid, hereby sells and conveys a life estate in the real property,  
including without limitation the appurtenances,\* unto \_\_\_\_\_  
\_\_\_\_\_, Life Estate Grantee, whose legal address is \_\_\_\_\_, of the  
\_\_\_\_\_ \*\*County of \_\_\_\_\_, State of \_\_\_\_\_, \*\*\* and a remainder  
unto \_\_\_\_\_, Remainder Grantee[s], whose legal address is \_\_\_\_\_  
\_\_\_\_\_, of the \_\_\_\_\_ \*\*County of \_\_\_\_\_, State of \_\_\_\_\_,  
(in joint tenancy),\*\*\*\* upon the death of Life Estate Grantee, in and to the following real property, including without  
limitation the appurtenances,\* situate in the \_\_\_\_\_ \*\*County of \_\_\_\_\_ and State of Colorado, to wit:

[Legal Description]

also known by street address as:  
assessor's schedule or parcel number:\*\*\*\*\*

As used herein, the singular includes the plural and the plural the singular.

**LIFE ESTATE GRANTEE**, shall have the sole use, control, benefit, and income of the described real property,  
including without limitation the appurtenances,\* during Life Estate Grantee's lifetime.

**[LIFE ESTATE GRANTEE] OR [REMAINDER GRANTEE(S)]**, shall pay for maintenance, repairs, taxes,  
insurance, mortgage, and assessments during Life Estate Grantee's lifetime.

Signed this \_\_\_\_ day of \_\_\_\_\_, 20 \_\_\_\_.

GRANTOR

\_\_\_\_\_  
[GRANTOR'S NAME]

STATE OF COLORADO )  
 ) SS.  
\*\*COUNTY OF \_\_\_\_\_ )

This foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ by \_\_\_\_\_  
\*\*\*\*\*

Witness my hand and official seal.  
My commission expires\*\*\*\*\*

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Name and Address of Person Creating Newly Created Legal Description (§38-35-106.5, C.R.S.)

\* There is some uncertainty regarding whether or not mineral and water rights are “appurtenances.” Generally, mineral rights are not considered “appurtenances” and will be conveyed whether or not this phrase is included in the deed unless expressly reserved. Water rights may or may not be “appurtenant.” Best practice is to specifically include in the deed known existing water rights. When dealing with known issues regarding mineral and water rights, practitioner should conduct additional legal research as these areas are complex and nuanced.  
\*\* If in Denver or Broomfield, insert “City and.”  
\*\*\*Update the address in the conveyance if Life Estate Grantee is not paying property taxes during Life Estate Grantee’s lifetime.  
\*\*\*\*Strike as required.  
\*\*\*\*\* Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor’s information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.  
\*\*\*\*\* See CRS § 24-21-516 for alternative acknowledgement language. Both the state and the county in which the notarial act is performed should be stated. If the notarial act is performed using statutorily authorized remote notarization, the certification should also include all additional language prescribed by the remote notarization rules, e.g. that the act was done remotely using audio-visual communication.  
\*\*\*\*\*If the notary stamp does not include the expiration date, include the date on this line.

SUPPLEMENTARY AFFIDAVIT PURSUANT TO  
C.R.S. § 38-31-102<sup>1</sup>

 DRAFT

STATE OF COLORADO  
\_\_\_\_\_ <sup>2</sup> County of \_\_\_\_\_ <sup>3</sup>

In the matter of the title to real property, and pursuant to C.R.S. § 38-31-102, the Affiant,  
\_\_\_\_\_ [NAME OF AFFIANT], being first duly sworn upon oath or by affirmation, states  
that Affiant is of legal age and has personal knowledge of the facts stated herein and that the person  
referred to

- in the certificate or verification of death recorded on \_\_\_\_\_ at Reception No.  
\_\_\_\_\_, in the Clerk and Recorder's Office of \_\_\_\_\_ County, Colorado; or
- in the attached certificate or verification of death<sup>4</sup>,

is one and the same person as \_\_\_\_\_ [NAME OF DECEASED] who is  
named in the instrument recorded on \_\_\_\_\_ at Reception No. \_\_\_\_\_, in the Clerk and  
Recorder's Office of \_\_\_\_\_ County, Colorado, which conveyed the real property described  
below, situate in the \_\_\_\_\_ County of \_\_\_\_\_ and State of Colorado, to wit:

[LEGAL DESCRIPTION OF PROPERTY] <sup>5</sup>

also known by street and number as: \_\_\_\_\_ [ADDRESS OF REAL ESTATE]  
assessor's schedule number or parcel number:<sup>6</sup> \_\_\_\_\_

\_\_\_\_\_  
Affiant

\_\_\_\_\_  
[PRINTED NAME OF AFFIANT]

Signed and sworn to or affirmed before me by Affiant, \_\_\_\_\_, on  
\_\_\_\_\_, in the \_\_\_\_\_ <sup>7</sup> County of \_\_\_\_\_ <sup>8</sup>.

Witness my hand and official seal.  
My commission expires:<sup>9</sup> \_\_\_\_\_

\_\_\_\_\_  
Notary Public<sup>10</sup>

---

<sup>1</sup> *Purpose of Affidavit.* This affidavit is designed to comply with the requirements of C.R.S. § 38-31-102, as amended in 2016, which provides that a certificate or verification of death of a joint tenant, life tenant, owner of real property under a beneficiary deed, or any other person whose interest in real property terminates upon their death to the same extent as a joint tenant, may be recorded in the county where the real property is located, together with a supplementary affidavit.

<sup>2</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and." If this affidavit is being notarized in any other county, this field should be left blank.

<sup>3</sup> The county in which the oath is administered to the affiant or the affirmation is taken should be entered in this field.

<sup>4</sup> *Order of Recordings.* The decedent's certificate or verification of death may either be recorded as an attachment to this affidavit or as a separate prior recording. If the decedent's certificate or verification of death is recorded as a separate prior recording, the reception number of the recorded decedent's certificate or verification of death should be stated in this affidavit.

<sup>5</sup> The legal description of the property being referenced in this affidavit should be same as the legal description of the property on the deed vesting title in the relevant joint tenancy, life estate, or beneficiary deed, unless you are aware of some change in description since the vesting deed. Do not rely on the property description provided by a county assessor's office. The assessor's office can use an abbreviated legal description which is not the complete and actual legal description. The best practice may entail obtaining an Ownership and Encumbrance Report or a more detailed title report on the property at issue. A schedule with the property's legal description may also be attached to this affidavit. When doing so, this field should read "See attached Schedule [SCHEDULE NUMBER/LETTER]." As an alternative, this field may refer to the property description on the deed vesting title in the relevant joint tenancy, life estate, or beneficiary deed.

<sup>6</sup> Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed:

<sup>7</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and". If this affidavit is being notarized in any other county, this field should be left blank.

<sup>8</sup> The county in which the oath is administered to the affiant or the affirmation is taken should be entered in this field.

<sup>9</sup> If the notary stamp does not include the expiration date, include the date on this line.

<sup>10</sup> For affidavits affecting real property, practitioner must decide whether in the particular situation at hand also including an acknowledgement with the jurat, either separately or combining the two, would be useful. The jurat is to put the individual under oath and subject to penalties of perjury. The acknowledgement is to receive the presumptions that go along with an acknowledgement as to title and the benefits towards marketability of the subject property, including those under C.R.S. § 38-35-101(3) and C.R.S. § 38-35-104.

AFFIDAVIT PURSUANT TO  
C.R.S. § 38-31-103<sup>1</sup>

 DRAFT

STATE OF COLORADO  
\_\_\_\_\_ <sup>2</sup> County of \_\_\_\_\_ <sup>3</sup>

Pursuant to C.R.S. § 38-31-103, the Affiants, \_\_\_\_\_ [NAME OF AFFIANT #1] and  
\_\_\_\_\_ [NAME OF AFFIANT #2], being first duly sworn upon oath or by  
affirmation, state:

that Affiants are of legal age;

that Affiants have personal knowledge of the facts;

that Affiants have no record interest in the real property described below;

that a certificate of death, verification of death document, or certified copy thereof for \_\_\_\_\_

[NAME OF DECEDENT] cannot be procured because \_\_\_\_\_;

that the date and place of death of \_\_\_\_\_ [NAME OF DECEDENT] was

\_\_\_\_\_ ; and that \_\_\_\_\_ [NAME OF DECEDENT]

referred to in this affidavit was at the time of death an owner of an interest in the real property described

below situate in the \_\_\_\_\_ County of \_\_\_\_\_ and State of Colorado, to wit:

[LEGAL DESCRIPTION OF PROPERTY] <sup>4</sup>

also known by street and number as: \_\_\_\_\_ [ADDRESS OF REAL ESTATE]

assessor's schedule number or parcel number: <sup>5</sup> \_\_\_\_\_

which interest terminated at the death of the above named decedent.

\_\_\_\_\_  
Affiant

\_\_\_\_\_  
[PRINTED NAME OF AFFIANT #1]

Signed and sworn to or affirmed before me by Affiant, \_\_\_\_\_, on \_\_\_\_\_, in the \_\_\_\_\_<sup>6</sup> County of \_\_\_\_\_<sup>7</sup>.

Witness my hand and official seal.

My commission expires:<sup>8</sup> \_\_\_\_\_

\_\_\_\_\_  
Notary Public<sup>9</sup>

\_\_\_\_\_  
Affiant

\_\_\_\_\_  
[PRINTED NAME OF AFFIANT #2]

Signed and sworn to or affirmed before me by Affiant, \_\_\_\_\_, on \_\_\_\_\_, in the \_\_\_\_\_ County of \_\_\_\_\_.

Witness my hand and official seal.

My commission expires: \_\_\_\_\_

\_\_\_\_\_  
Notary Public

<sup>1</sup> *Purpose of Affidavit.* This affidavit is designed to comply with the requirements of C.R.S. § 38-31-103, as amended in 2014, which provides that such an affidavit can be recorded in the county where the described real property is located as prima facie proof of the death of an owner of a recorded interest in the described real property which terminates upon death of the owner, in the case in which a certificate of death or a verification of death cannot be obtained. Note there must be at least two affiants.

<sup>2</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and." If this affidavit is being notarized in any other county, this field should be left blank.

<sup>3</sup> The county in which the oath is administered to the affiants or the affirmation is taken should be entered in this field.

<sup>4</sup> The legal description of the property being referenced in this affidavit should be same as the legal description of the property on the deed vesting title in the relevant joint tenancy, life estate, or beneficiary deed, unless you are aware of some change in description since the vesting deed. Do not rely on the property description provided by a county assessor's office. The assessor's office can use an abbreviated legal description which is not the complete and actual legal description. The best practice may entail obtaining an Ownership and Encumbrance Report or a

---

more detailed title report on the property at issue. A schedule with the property's legal description may also be attached to this affidavit. When doing so, this field should read "See attached Schedule [SCHEDULE NUMBER/LETTER]." As an alternative, this field may refer to the property description on the deed vesting title in the relevant joint tenancy, life estate, or beneficiary deed.

<sup>5</sup> Practitioner may prefer to not include this information in the deed. CRS § 38-35-122(1) expressly invites its inclusion but does not require it. CRS § 38-35-122(2) states any discrepancy to be resolved in favor of the legal description. The possibility of an error in the assessor's information must be considered as it could still lead to perceived ambiguities in what property is being conveyed.

<sup>6</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and." If this affidavit is being notarized in any other county, this field should be left blank.

<sup>7</sup> The county in which the oath is administered to the affiants or the affirmation is taken should be entered in this field.

<sup>8</sup> If the notary stamp does not include the expiration date, include the date on this line.

<sup>9</sup> For affidavits affecting real property, practitioner must decide whether in the particular situation at hand also including an acknowledgement with the jurat, either separately or combining the two, would be useful. The jurat is to put the individual under oath and subject to penalties of perjury. The acknowledgement is to receive the presumptions that go along with an acknowledgement as to title and the benefits towards marketability of the subject property, including those under C.R.S. § 38-35-101(3) and C.R.S. § 38-35-104.

**AFFIDAVIT FOR GRANTEE ACTING IN A  
REPRESENTATIVE CAPACITY  
PURSUANT TO C.R.S. § 38-30-108<sup>1</sup>**

**DRAFT**

STATE OF COLORADO

\_\_\_\_\_ <sup>2</sup> County of \_\_\_\_\_ <sup>3</sup>

I, \_\_\_\_\_ [NAME OF AFFIANT], for the purpose of complying with Section 38-30-108, C.R.S., state:

1. \_\_\_\_\_ is the grantee in a representative capacity named in an instrument conveying an interest in real property.
2. The instrument was recorded at \_\_\_\_\_ [Reception/Film No.] [Book/Page No.] on \_\_\_\_\_ [date] in the records of the Clerk and Recorder of the \_\_\_\_\_ <sup>4</sup> County of \_\_\_\_\_, Colorado.
3. In the instrument, the interest was transferred to the undersigned as:

- |  |  |
|--|--|
| <input type="checkbox"/> Trustee       | <input type="checkbox"/> Attorney-in-Fact        |
| <input type="checkbox"/> Agent         | <input type="checkbox"/> Personal Representative |
| <input type="checkbox"/> Conservator   | <input type="checkbox"/> Nominee                 |
| <input type="checkbox"/> Executor      | <input type="checkbox"/> Custodian               |
| <input type="checkbox"/> Administrator | <input type="checkbox"/> Other _____             |

4.<sup>5</sup> The undersigned also states (complete at least one of the following):

- a. The name of the person represented is \_\_\_\_\_.
- b. The statute, trust or other agreement, or the court appointment under which the grantee is acting is: \_\_\_\_\_.
- c. The description of the representative capacity of the undersigned was recorded at \_\_\_\_\_ [Reception/Film No.] [Book/Page No.] on \_\_\_\_\_ [date] in the records of the Clerk and Recorder of the \_\_\_\_\_ <sup>6</sup> County of \_\_\_\_\_, Colorado.

Dated: \_\_\_\_\_

\_\_\_\_\_  
Affiant

\_\_\_\_\_  
[PRINT NAME OF AFFIANT]

Signed and sworn to or affirmed before me by Affiant, \_\_\_\_\_, on \_\_\_\_\_, in the \_\_\_\_\_ <sup>7</sup> County of \_\_\_\_\_ <sup>8</sup>.

Witness my hand and seal.

My commission expires:<sup>9</sup> \_\_\_\_\_

\_\_\_\_\_  
Notary Public<sup>10</sup>

<sup>1</sup> *Purpose of Affidavit.* This affidavit is designed to comply with the requirements of C.R.S. § 38-30-108, as amended in 2001. It might be used when an instrument conveying an interest in real property, in which the grantee is described as a person acting in a representative capacity, does not also (1) name the person so represented; (2) identify the statute, the trust or other agreement, or the court appointment under which the grantee is acting; or (3) refer, by proper description to book, page, document number, or file to an instrument, order, decree, or other writing containing any such description of the representative capacity of the grantee that is recorded with the county clerk and recorder in the county where the real property is located. This statutory provision provides that such an affidavit executed by or on behalf of the grantee may be recorded with the county clerk and recorder of the county where the subject real estate is located and shall serve as notice to all persons of the representative capacity of the grantee with respect to the interest in real property so conveyed.

<sup>2</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and." If this affidavit is being notarized in any other county, this field should be left blank.

<sup>3</sup> The county in which the oath is administered to the affiants or the affirmation is taken should be entered in this field.

<sup>4</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and." If this affidavit is being notarized in any other county, this field should be left blank.

<sup>5</sup> Affiants are encouraged to include all applicable information under 4. This may be necessary, for example, to expedite the title process.

<sup>6</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and." If this affidavit is being notarized in any other county, this field should be left blank.

<sup>7</sup> If this affidavit is being notarized in Denver or Broomfield, this field should read "City and." If this affidavit is being notarized in any other county, this field should be left blank.

<sup>8</sup> The county in which the oath is administered to the affiants or the affirmation is taken should be entered in this field.

<sup>9</sup> If the notary stamp does not include the expiration date, include the date on this line.

<sup>10</sup> For affidavits affecting real property, practitioner must decide whether in the particular situation at hand also including an acknowledgement with the jurat, either separately or combining the two, would be useful. The jurat is to put the individual under oath and subject to penalties of perjury. The acknowledgement is to receive the presumptions that go along with an acknowledgement as to title and the benefits towards marketability of the subject property, including those under C.R.S. § 38-35-101(3) and C.R.S. § 38-35-104.

DRAFT

STATEMENT OF AUTHORITY

1. This Statement of Authority relates to an entity<sup>1</sup> named \_\_\_\_\_, and is executed on behalf of the entity pursuant to the provisions of Section 38-30-172, C.R.S.

2. The type of entity is a:

- checkbox corporation
checkbox nonprofit corporation
checkbox limited liability company
checkbox general partnership
checkbox limited partnership
checkbox other:
checkbox registered limited liability partnership
checkbox registered limited liability limited partnership
checkbox limited partnership association
checkbox government or governmental subdivision or agency
checkbox trust (Section 38-30-108.5, C.R.S.)

3. The entity is formed under the laws of: \_\_\_\_\_

4. The mailing address for the entity is: \_\_\_\_\_

5. The checkbox name checkbox position of each person authorized to execute instruments conveying, encumbering, or otherwise affecting title to real property on behalf of the entity is: \_\_\_\_\_

6.2 The authority of the foregoing person(s) to bind the entity is checkbox not limited checkbox limited as follows:

7. Other matters concerning the manner in which the entity deals with interests in real property:

Executed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.3

Signature (Type or Print Name Below)

STATE OF COLORADO )
) ss.
\_\_\_\_\_4COUNTY OF \_\_\_\_\_)

The foregoing instrument was acknowledged before me on \_\_\_\_\_, 20\_\_ by

Witness my hand and official seal.

1 This form should not be used unless the entity is capable of holding title to real property.
2 The absence of any limitation shall be prima facie evidence that no such limitation exists.
3 The statement of authority must be recorded to obtain the benefits of the statute.
4 If in Denver or Broomfield, insert "City and."

My commission expires:<sup>5</sup> \_\_\_\_\_

\_\_\_\_\_  
Notary Public<sup>6</sup>

---

<sup>5</sup> If the notary stamp does not include the expiration date, include the date on this line.

<sup>6</sup> Practitioner must decide whether in the particular situation at hand also including a jurat with the acknowledgement, either separately or combining the two, would be useful. The jurat is to put the individual under oath and subject to penalties of perjury.

## General Notes on Use for Deeds

DRAFT

The preferred approach in drafting the property description on a deed or other instrument (including water and mineral interests) is to use the precise language from the vesting instrument, a copy of which can often be obtained via an Ownership and Encumbrance Report from a title company. The legal description of the property being referenced in the transferring deed should be same as the legal description of the property on the deed vesting title, unless you are aware of some change in description since the vesting deed. Do not rely on the property description provided by a county assessor's office. The assessor's office can use an abbreviated legal description which is not the complete and actual legal description. The best practice may entail obtaining an Ownership and Encumbrance Report or a more detailed title report on the property at issue. A schedule with the property's legal description may also be attached. When doing so, this field should read "See attached Schedule [SCHEDULE NUMBER/LETTER]." As an alternative, this field may refer to the property description on the deed vesting title in the relevant joint tenancy, life estate, or beneficiary deed. In addition, the precise name of the prior grantee should be used as the name of the grantor for the subsequent deed. Every deed should include an address for the grantee (to provide an address for purposes of mailing tax notices pursuant to C.R.S. §38-35-109(2)) and must be acknowledged. It is also important to state if multiple grantees are taking title as joint tenants. If not specified in the deed, the conveyance will be deemed to vest the grantees as tenants in common.

There are four basic types of deeds: general warranty deed (which warrants title to the property both prior to and after the grantor acquired title to the property), special warranty deed (which warrants against title defects during the period of time the grantor owned the property), bargain and sale deed (which contains no warranties of title, but does convey any after-acquired title to the property), and quitclaim deed (which contains no warranties whatsoever and does not convey after-acquired title). Personal representative, trustee, and conservator's deeds should be bargain and sale deeds. To be a bargain and sale deed, the deed should include the words "sell(s) and convey(s)." General warranty deeds are addressed at C.R.S. §38-30-113(1)(a), and special warranty deeds and bargain and sale deeds are addressed at C.R.S. §38-30-113(1)(b) and (1)(c). When transferring real property to a grantee, title insurance might be recommended to the grantee regardless of the type of deed being utilized to make the transfer, particularly if there are circumstances that can create uncertainty as to title, including prior deeds drafted by a party without professional assistance. It is a good practice to also advise the grantee as to the need for transfer of casualty and liability insurance protection.

A Real Property Transfer Declaration (TD-1000) can be completed and submitted at the time of sale of real property so that the appropriate documentary fee can be calculated and any necessary allocation of sales or use taxes can be made.

More information on the different forms of deed can be found in "Which Deed Should I Use?", 48 *Colo. Law.* 34 (Jan. 2019).

DRAFT

## Personal Representative's Deeds-Notes on Use

Two different forms of personal representative deeds are provided. One deed form is a Deed of Distribution that can be used by the personal representative of either a testate or intestate estate to distribute the real estate to either the devisees or the heirs of the estate, as the case may be. The other deed form is to be used in the case of a sale of the real estate by the personal representative for valuable consideration.

Along with the deed, a certified copy of the court document evidencing the authority of the personal representative to convey title to the real estate should be recorded with the Clerk and Recorder of the County in which the real estate is located. In the case of a testate estate, this document would be Letters Testamentary. In the case of an intestate estate, this document would be Letters of Administration.

The deed forms provided are bargain and sale deeds which make no warranties of title, but do convey after acquired title. A fiduciary is prohibited from giving general warranties of title.

 DRAFT

## Trustee's Deeds Notes on Use

This deed presumes that the grantor is the trustee of a trust. In Colorado, the preferred titling of real property in trust, however, is in the name of the trust itself rather than the name of the trustee. This mode of titling is explicitly authorized by C.R.S. §38-30-108.5. This approach greatly simplifies the subsequent transfer of real property out of the trust in the event the trusteeship changes, such as the death or incapacity of the original trustee. This approach also avoids any argument that the real property is subject to the trustee's individual creditors. See *Lagae v. Lackner*, 996 P.2d 1281 (Colo. 2000) and R. Sterling Ambler, "Title to Colorado Real Property Held in Trust," 31 *Colo. Law.* 87 (May 2002).

If the trust itself is named in the deed to real property, a statement of authority can be relied upon as evidence of the existence of the trust and authority of the trustee to deal with the real property. C.R.S. §38-30-172. When there is a change in the trustee, the successor trustee can simply execute and record a new statement of authority.

It may be desirable for any trustee holding title to real property in his or her name as trustee to execute a deed conveying the property directly into the trust itself to avoid future transfer problems.

If the consideration for the deed is less than \$500, it may be desirable to add a statement to that effect on the deed to indicate no need for payment of a documentary fee. C.R.S. §39-13-102.

If real property is transferred to a revocable trust, the practitioner may want to advise the client to add the trust to the client's homeowner's insurance. Furthermore, an endorsement to the title policy may be needed to maintain title insurance coverage.

 DRAFT

## CONSERVATOR'S DEED – NOTES ON USE

Conservator's deeds are used to convey an interest in real property that is held by a Protected Person. Conservators are given title as Trustee to all of a Protected Person's property under C.R.S. § 15-14-421, unless otherwise ordered by the court, and as such, have the authority to convey that property in the best interests of the Protected Person. See also, C.R.S. § 15-14-425. Once a Conservator has been appointed, any transfers of the property cannot be legally accomplished by the Protected Person. See C.R.S. § 15-14-422. However, recording the Conservator's Letters of Conservatorship will avoid the Protected Person taking action that will give rise to a claim against the Protected Person's Estate.

While this deed is in a form to transfer the property interest to one Grantee, it may be used to transfer a property interest to multiple Grantees. If the drafter is attempting to transfer to multiple parties, it is important to add if the interest is to be received by Grantees as joint tenants. If not specified in the deed the default is tenancy in common.

The Order Appointing Conservator may limit the authority of the Conservator to transfer certain assets and may also require Court approval of actions taken by the Conservator. See C.R.S. § 15-14-411 and 421.

A Conservator must disclose his or her representative capacity and identify the estate in order to avoid personal liability, however, there are still instances where a Conservator can be personally liable for obligations arising from the ownership or control of the Protected Person's property. See C.R.S. § 15-14-430. Persons dealing with the Conservator in good faith and for value are protected under C.R.S. § 15-14-424.

## Beneficiary Deed Note on Use

The CBA-CLE form uses substantially the same language as set forth in C.R.S. § 15-15-404 for a Colorado beneficiary deed. The statute does not require that its specific language be used; rather, it requires only that a beneficiary deed contain the words “conveys on death” or “transfers on death,” or otherwise indicates that a transfer is to be effective upon the death of the grantor.

This beneficiary deed is the equivalent of a bargain and sale deed; that is, it conveys the grantor’s after-acquired title without any warranties (C.R.S. § 15-15-404(2)). Any person or entity receiving title to real property by way of a beneficiary deed will take title subject to any encumbrances on the property, such as a mortgage or a lien, in effect on the date of the grantor’s death (C.R.S. § 15-15-407(2)).

Note the language in capitals regarding disqualification from Medicaid. A person who applies for or receives “medical assistance”, including Medicaid, which would entitle the state to assert a claim for recovery of costs or assets, overpayments, penalties, adjustments, or liens, cannot receive such assistance if they have a beneficiary deed in effect. Any real property subject to a beneficiary deed signed and recorded by a person who applies for or is receiving medical assistance will be a “countable resource” (that is, property voluntarily transferred without fair and valuable consideration) for the purpose of qualifying for Medicaid (*see* C.R.S. § 15-15-403).

Finally, title companies will often refuse to transfer or insure title after the death of the grantor of property under a beneficiary deed because of the provisions of C.R.S. § 15-15-407(3), which gives a person “with an interest in the property” (such as an omitted heir or a lienholder) 4 months after the date of the grantor’s death to record a document memorializing their interest. If no such person records any documents, the grantee-beneficiary takes title to the property subject only to any encumbrances existing as of the date of death of the grantor (C.R.S. § 15-15-410(1)).

The practitioner may wish to review the following Colorado Lawyer articles on beneficiary deeds:

- “*Practical Considerations in the Use of Colorado Beneficiary Deeds*”, 44 Colo.Law. 41, January 2015;
- “*Beneficiary Deeds in Colorado – Part I: Overview of Legislation – Estate and Trust Forum*”, 34 Colo.Law. 79, June 2005; and
- “*Beneficiary Deeds in Colorado – Part II: Practical Applications – Real Estate Law Newsletter*”, 34 Colo.Law. 103, June 2005.

 DRAFT

### **Revocation of Beneficiary Deed Notes on Use**

The CBA-CLE form uses substantially the same language as set forth in C.R.S. § 15-15-405 for the revocation of a Colorado beneficiary deed. The statute does not require that its specific language be used; rather, it requires only that a revocation of a beneficiary deed (i) describe the real property affected, (ii) revoke the deed, and (iii) be recorded before the death of the grantor in the recorder's office for the county in which the real property is located (C.R.S. § 15-15-405(1)).

Note that a subsequently recorded beneficiary deed will also automatically revoke all prior beneficiary designations made in an earlier-recorded beneficiary deed, without specific reference to the prior beneficiary deed, as long as it is recorded before the death of the grantor (C.R.S. § 15-15-405(2)).

DRAFT

## Deeds Conveying a Life Estate - Notes on Use

Colorado law allows the grant of a life estate. See *Million v. Botefur*, 9 P.2d 284 (1932); *Kendall v. Wiles*, 483 P.2d 388 (Colo. App. 1971). Any language that reflects the intent of a grantor to create a life estate is sufficient. See *Willis V. Carpenter & Holly S. Hoxeng*, *Colorado Real Estate Practice* § 3.7 (CLE in Colorado, Inc. 2015).

Two separate deeds are provided to convey either (i) the real property to a grantee reserving a life estate in the grantor (Deed Reserving Life Estate) or (ii) a life estate in the real property to a certain grantee and a remainder interest to a different grantee (Deed to Different Life Estate and Remainder Grantees). The grant language found in the Deed to Different Life Estate and Remainder Grantees could be adapted for use in a Personal Representative's Deed of Distribution to implement a testamentary devise of a separate life estate and a remainder interest.

Once the practitioner selects the appropriate deed, the practitioner should customize the text in that deed as it relates to who will be responsible for expenses related to the property. As a practical matter, it is best for the deed to identify which interest holder pays for maintenance, repairs, taxes, insurance, and assessments. The client may want to separate the obligations for maintenance or repairs from other obligations, and/or may want to have more specification of the obligations for maintenance or repairs. The practitioner should consider advising the client to confer with any title insurance company that had insured the grantor's title about adding the grantee as an additional insured on the title insurance policy and/or using a warranty deed.

 DRAFT

SUPPLEMENTARY AFFIDAVIT NOTES ON USE

1. Purpose of Affidavit. This affidavit is designed to comply with the requirements of C.R.S. § 38-31-102, as amended in 2016, which provides that a certificate or verification of death of a joint tenant, life tenant, owner of real property under a beneficiary deed, or any other person whose interest in real property terminates upon their death to the same extent as a joint tenant, may be recorded in the county where the real property is located, together with a supplementary affidavit.
2. *Order of Recordings*. The decedent's certificate or verification of death may either be recorded as an attachment to this affidavit or as a separate prior recording. If the decedent's certificate or verification of death is recorded as a separate prior recording, the reception number of the recorded decedent's certificate or verification of death should be stated in this affidavit.
3. The legal description of the property being referenced in this affidavit should be the same as the legal description of the property on the deed vesting title in the relevant joint tenancy, life estate, or beneficiary deed, unless you are aware of some change in description since the vesting deed. Do not rely on the property description provided by a county assessor's office. The assessor's office can use an abbreviated legal description which is not the complete and actual legal description. The best practice may entail obtaining an Ownership and Encumbrance Report or a more detailed title report on the property at issue. A schedule with the property's legal description may also be attached to this affidavit. When doing so, this field should read "See attached Schedule [SCHEDULE NUMBER/LETTER]." As an alternative, this field may refer to the property description on the deed vesting title in the relevant joint tenancy, life estate, or beneficiary deed.

 DRAFT

### Statement of Authority Notes on Use

The statement of authority must be recorded to obtain the benefits of the statute (C.R.S. § 38-30-172(5)). Upon recording, a statement of authority shall constitute prima facie evidence of the facts recited in the statement of authority insofar as the facts affect title to real property and prima facie evidence of the authority of the person executing the statement of authority to execute and record the statement of authority on behalf of the entity.

This form should not be used unless the entity is capable of holding title to real property.

The absence of any limitation shall be prima facie evidence that no such limitation exists. C.R.S. § 38-30-172(6).

In situations where there are two trustees who can act on behalf of a trust, it is recommended that the practitioner clarifies in paragraph 6 of the statement of authority whether a trustee can act independently without joinder of the other trustee(s). This information should be available in the trust agreement.

**Council of the Trust and Estate Section of the Colorado Bar Association  
Minutes of May 26, 2020, Special Meeting**

Council met on Tuesday, May 26, 2020 via audio-visual conference due to the ongoing COVID19 situation. The meeting was called specifically for review and approval of the amicus brief in the *Trevino* matter.

The following members of Council participated and constituted a quorum:

Josie Faix, Chair  
Spencer Crona, Vice Chair  
Tim Bounds, Secretary  
Leia Ursery, Chair Pro-Tem  
Lauren Da Cunha (2<sup>nd</sup> year member)  
Peggy Gardner (2<sup>nd</sup> year member)  
Elizabeth Meck (2<sup>nd</sup> year member)  
Louisa Ritsick (1<sup>st</sup> year member)  
Kristin Dittus (1<sup>st</sup> year member)

**1. *Trevino* Amicus Brief**

There was discussion among Council members regarding the proposed draft of the *Trevino* amicus brief, and consideration of proposed revisions submitted by Business Law Section. **A motion was made, seconded and approved unanimously to adopt the version of the brief prepared by the Trust & Estates Section. Further, Council deputizes Spencer Crona and Leia Ursery to solicit and incorporate comments from Business Law Section as appropriate.**

The meeting was adjourned at 5:25 p.m.

Respectfully submitted

/s/ Timothy Bounds, Secretary

Colorado Bar Association  
**Trust & Estate**  
For the Twelve Months Ending June 29, 2020

		June	YTD	Budget	Variance	%	Last FY
<b>Beginning balance</b>	<b>01-3160-31600</b>		<b>\$22,262.87</b>		<b>\$22,262.87</b>	<b>0%</b>	<b>\$7,804.88</b>
<b>Trust &amp; Estate Section</b>							
<b>Revenue</b>							
Dues Income Section	01-4050-31600	240.00	32,835.00		32,835.00	0%	32,560.00
Meal Income	01-4051-31600					0%	1,040.00
<b>Total Revenue Trust &amp; Estate Sect</b>		<b>240.00</b>	<b>32,835.00</b>		<b>32,835.00</b>	<b>0%</b>	<b>33,600.00</b>
<b>Expenses</b>							
Other Expense	01-5000-31600	(162.54)	(162.54)		(162.54)	0%	(25.80)
AWARDS	01-5007-31600		(338.94)		(338.94)	0%	(633.14)
Travel	01-5102-31600		(60.44)		(60.44)	0%	
Postage	01-5304-31600		(0.50)		(0.50)	0%	(11.32)
Telephone	01-5412-31600					0%	(518.99)
Internet/E-Mail Access	01-5413-31600		(544.99)		(544.99)	0%	(1,304.75)
Meals (Not travel related)	01-5491-31600	(150.55)	(4,962.60)		(4,962.60)	0%	(10,442.21)
Administration Fee	01-5494-31600	(504.17)	(6,050.04)		(6,050.04)	0%	(6,045.00)
Grants/Contributions	01-5500-31600		(10,000.00)		(10,000.00)	0%	
<b>Total Expenses Trust &amp; Estate Sec</b>		<b>(817.26)</b>	<b>(22,120.05)</b>		<b>(22,120.05)</b>	<b>0%</b>	<b>(18,981.21)</b>
<b>Statutory Revisions Committee</b>							
<b>Revenue</b>							
<b>Rev. Elderlaw Joint Task Force</b>							
<b>Rev. Uniform POA Act</b>							
<b>Rev. Uniform Trust Code</b>							
<b>Expenses</b>							
<b>Exp. Elderlaw Joint Task Force</b>							
<b>Exp. Uniform POA Act</b>							
<b>Exp. Uniform Trust Code</b>							
<b>CLE</b>							
<b>Revenue</b>							

Colorado Bar Association  
**Trust & Estate**  
 For the Twelve Months Ending June 29, 2020

	June	YTD	Budget	Variance	%	Last FY
<b>Revenue Joint CLE</b>						
<b>Revenue CLE Retreat</b>						
<b>Revenue CLE Section Only</b>						
<b>Expenses</b>						
<b>Expenses Joint CLE</b>						
<b>Expenses CLE Retreat</b>						
<b>Expenses CLE Section Only</b>						
<b>Council Notes</b>						
<b>Revenue</b>						
<b>Expenses</b>						
<b>Community &amp; Civic Affairs</b>						
<b>Revenue</b>						
<b>Expenses</b>						
<b>Rules &amp; Forms Committee</b>						
<b>Revenue</b>						
<b>Expenses</b>						
<b>Orange Book Forms</b>						
<b>Revenue</b>						
<b>Expenses</b>						
<b>Local Liaison</b>						
<b>Revenue</b>						
<b>Expenses</b>						
<b>Uniform Trust Code</b>						
<b>Revenue</b>						

Colorado Bar Association  
**Trust & Estate**  
 For the Twelve Months Ending June 29, 2020

	June	YTD	Budget	Variance	%	Last FY
<b>Expenses</b>						
<b>Transfer Deposits</b>						
Revenue						
Expenses						
<b>Admin. Chair</b>						
Revenue						
Expenses						
<b>Estate Planning Handbook</b>						
Revenue						
Expenses						
<b>Admin Council Dinner</b>						
Revenue						
Meal Income	01-4051-31612	\$1,440.00		\$1,440.00	0%	
<b>Total Revenue Admin Council Din</b>		<b>1,440.00</b>		<b>1,440.00</b>	<b>0%</b>	
Expenses						
Travel	01-5102-31612	(25.00)		(25.00)	0%	
Meals (Not travel related)	01-5491-31612	(5,173.20)		(5,173.20)	0%	
<b>Total Expenses Admin Council Di</b>		<b>(5,198.20)</b>		<b>(5,198.20)</b>	<b>0%</b>	
<b>Legislative Liaison</b>						
Revenue						
Expenses						
<b>Internet Editor</b>						
Revenue						
Expenses						
<b>Technology Committee</b>						
Revenue						

Colorado Bar Association  
**Trust & Estate**  
For the Twelve Months Ending June 29, 2020

		June	YTD	Budget	Variance	%	Last FY
<b>Expenses</b>							
<b>Real Estate Liaison</b>							
Revenue							
<b>Expenses</b>							
<b>Green Book</b>							
Revenue							
<b>Expenses</b>							
<b>The Colorado Lawyer</b>							
Revenue							
<b>Expenses</b>							
<b>T&amp;E Diversity Committee</b>							
Revenue							
<b>Expenses</b>							
Judicial Liaison							
Revenue							
<b>Expenses</b>							
<b>Member Vouchers</b>							
<b>Expenses</b>							
<b>T&amp;E Young Lawyer Society</b>							
Revenue							
<b>Expenses</b>							
Meals (Not travel related)	01-5491-31629		(\$371.30)		(\$371.30)	0%	(\$160.80)
<b>Total Expenses T&amp;E YLS</b>			<b>(371.30)</b>		<b>(371.30)</b>	<b>0%</b>	<b>(160.80)</b>
<b>Beginning Balance</b>	01-3160-31600		22,262.87		22,262.87	0%	7,804.88
<b>Total Revenue All Sources</b>	01-4???-316??	240.00	34,275.00		34,275.00	0%	33,600.00
<b>Total Expense All Sources</b>	01-5???-316??	(817.26)	(27,689.55)		(27,689.55)	0%	(19,142.01)
<b>Ending Balance</b>		<b>(577.26)</b>	<b>28,848.32</b>		<b>28,848.32</b>	<b>0%</b>	<b>22,262.87</b>

Colorado Bar Association  
**Trust & Estate Summary**  
 For the Twelve Months Ending June 29, 2020

		June	YTD	Budget	Variance	%	Last FY
Beginning balance	01-3160-31600		\$22,262.87		\$22,262.87	0%	\$7,804.88
<b>Trust &amp; Estate Section- General</b>							
Revenue	01-4???-31600	240.00	32,835.00		32,835.00	0%	33,600.00
Expenses	01-5???-31600	(817.26)	(22,120.05)		(22,120.05)	0%	(18,981.21)
<b>Statutory Revisions Committee</b>							
<b>CLE</b>							
<b>Council Notes</b>							
<b>Community &amp; Civic Affairs</b>							
<b>Rules &amp; Forms Committee</b>							
<b>Orange Book Forms</b>							
<b>Local Liaison</b>							
<b>Uniform Trust Code</b>							
<b>Admin. Chair</b>							
<b>Estate Planning Handbook</b>							
<b>Admin Council Dinner</b>							
Revenue	01-4???-31612		1,440.00		1,440.00	0%	
Expenses	01-5???-31612		(5,198.20)		(5,198.20)	0%	
<b>Legislative Liaison</b>							
<b>Internet Editor</b>							
<b>Technology Committee</b>							
<b>Real Estate Liaison</b>							
<b>Green Book</b>							
<b>The Colorado Lawyer</b>							
<b>Diversity Committee</b>							
<b>Judicial Liaison</b>							
<b>Member Vouchers</b>							
<b>Uniform Trust Code</b>							
<b>Transfer Deposit</b>							
<b>Young Lawyer Society</b>							
Expenses	01-5???-31629		(371.30)		(371.30)	0%	(160.80)
Beginning Balance	01-3160-31600		22,262.87		22,262.87	0%	7,804.88
Total Revenue All Sources	01-4???-316??	240.00	34,275.00		34,275.00	0%	33,600.00
Total Expenses All Sources	01-5???-316??	(817.26)	(27,689.55)		(27,689.55)	0%	(19,142.01)
Ending Balance		(577.26)	28,848.32		28,848.32	0%	22,262.87