

**NOTICE OF MEETING FOR THE PROBATE TRIAL AND PROCEDURE
COMMITTEE OF THE TRUST AND ESTATE SECTION AND ELDER LAW SECTION
OF THE COLORADO BAR ASSOCIATION**

Wednesday, November 1, 2023, at 10 a.m.

Colorado Bar Association
West 1

<https://cba-cle.zoom.us/j/89554779264?pwd=QWNIT09vRVljUzY2ZHN5V3hWd0lYUT09>

Meeting ID: 895 5477 9264

Passcode: 043692

Call-in: 12532158782

AGENDA

1. Welcome and Introductions
2. Review of Minutes from October 4, 2023.
3. Chair's Report – Tammy Conover and Andrew Rogers
 - a. Email addresses and content locations
4. Updates/Reports from current committees:
 - a. E-Will Committee – Letty Maxfield
 - b. Wrongful Death Subcommittee – Aaron Evans
 - c. Court Visitor Subcommittee – Aaron Evans (No report until December meeting)
 - d. UPL – Tammy Conover
 - i. Meetings will be by Zoom, 10/31 updates
 - e. Mandatory Mediation and Simplified Procedure in Probate Cases – Spencer Crona
 - f. County Bench Bar Meetings – Angela Rockwood
5. UGCOPPA – Letty Maxfield & Andrew Rogers. Joint T&E, Reporting updates.
6. New Business

- a. Holiday Party – save the date! December 6th, 4pm.
 - i. Topics for panel?

NEXT MEETING: December 6, 2023 @ 10 a.m.

REMINDER: Join the Committee through CBA Membership Department, email tammy@conoverlawllc.com for monthly updates.

Probate Trial and Procedure Committee

Minutes of the October 4, 2023, Meeting

The Probate Trial and Procedure Committee met in-person and virtually through the Colorado Bar Association on October 4, 2023. The meeting was called to order at approximately 10:00 am.

The following members were present in person or participated by Zoom:

Lisa Blattner	Stan Kent	Al Sahlstrom
Lynne Bruzzese	Keith Lapuyade	Zach Schlichting
Annie Campbell	Kimberly Lavin	Catherine Seal
Geoffrey Carpenter	Letty Maxfield	Kathy Seidel
Shari Caton	Emily McDaniel	Sandra Sigler
Scott Challinor	Nick McWharter	Sara Stein
Tammy Conover	Sydney Merrel	Tamara Trujillo
Kelly Cooper	Kevin Millard	Herb Tucker
Lisha Coultrip	Kayla Nelson	Chelsea Ziegler
Spencer Crona	Kelly Campbell	Kris Zumalt
John Ferguson	Sal Quintana	Lisa Dunn
Leah Gates	Brian Reynolds	Stephen Wilson
Susie Germany	Angela Rockwood	Morgan Wiener
David Imbler	Andrew Rogers	

Welcome/Introductions

The minutes of the September 6, 2023, meeting were approved.

I. Chair's Report

- Email and content locations – Emma will be emailing out meeting materials, and they will also be posted on the PTPC website, which you can get to through T&E and Elder Law. Tammy working on having subcommittee stuff posted there as well.
- Future Court Invitations – Angela Rockwood going to help with this.

II. Updates/Reports

- Statutory Revisions for E-Wills – Letty gave update. Had first meeting, met with folks from financial institutions. Discussed lodging systems for Ewills. Committee decided worth considering reopening conversation, maybe something similar to Trust Registration Statements. Like a Notice of Execution of Ewill, and would give location where it is stored. Group has reached out to Judicial Branch/Secretary of State. Meeting every 3 weeks on Wed mornings. Next meeting is 9/10, then 10/8, remotely. Reach out to Letty if interested in joining/being involved.

- Unauthorized Practice of Law – Tammy gave update. Meetings by Zoom, last Tues of month at 11 am, except for December, Dec 3rd Tuesday. Notes will be posted on webpage. First meeting – discussed what end goal should be – some kind of clear guidance for prof. fiduciaries from OARC – what can they file/what not – where is the line. Issues with hospitals/financial institutions having patients/clients signing POAs/living wills, etc. No opinion back from John Gleason, former head of OARC. Medicaid Specialists counseling people on how to gift. Susie looking at National trends, reaching out to NALA. What are more rudimentary functions, because there are professional guardians that take cases with small pay/minimal pay, csvs with small estates.
- Mandatory Mediation / 16.1 Committee – Spencer and Herb Co-Chairing - Had first meeting. Spencer gave update. Concluded that best to get perspective from judiciary, Judge Leith and other judges – going to send email inviting them to a panel discussion on both of those issues. Next meeting is scheduled.
- UGCOPPA – Letty and Andrew Co-Chairing – Letty gave update. Disability Co/ARC – want to run UGCOPPA this year. Bar has already reviewed in past, mixed reviews, but no political will to move forward then, is now. Letty and Andrew meeting with stakeholders October 9 discuss further – what they are envisioning and its timeline. Very large statutory rewrite if all of it is to be implemented. If interested in joining, let Letty/Andrew know.
- Virtual Court Proceedings – No update this month.
- Wrongful Death Subcommittee – No update this month.
- Court Visitor Subcommittee – No update this month.

III. New Business

- Annual Holiday Party - December 6, 4pm, will discuss further next meeting. Still going to work to have judges/magistrates attend. Be thinking about subject areas/topics to be discussed.

IV. Adjournment

The meeting adjourned at approximately 10:52 a.m.