

**Council of the Trust and Estate Section of the Colorado Bar Association
Notice of and Agenda for the February 7, 2024, Meeting**

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

From: Jonathan F. Haskell
Secretary/Treasurer
5251 DTC Parkway, Suite 825
Greenwood Village, CO 80111
(303) 329-2201
jhaskell@wadeash.com

Notice of Meeting

The next monthly meeting of the 2023-2024 Council of the Trust and Estate Section of the Colorado Bar Association will be held:

Date and time: **Wednesday, March 6, 2024, 3:15 p.m.**

Place: In Person or Call-In/Zoom

<https://cba-cle.zoom.us/j/83843741966?pwd=NXVOTEExdUxuQ0FrV0VXV3ZrU3hVQT09>

Meeting ID: 838 4374 1966

Passcode: 534100

Call-in: 16694449171

Minutes of Previous Meetings & Attachments

1. Minutes of the January 3, 2024 meeting of the Council
2. November Financial Statements
3. CBA Real Estate Section Council Meeting

Trust and Estate Section Council Agenda
February 7, 2024

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 January 3, 2024 meeting of the Council
2. Chair's Report and Administrative Matters (Lauren Da Cunha)
3. Secretary/Treasurer's report (Jonathan Haskell)
4. Tax Section Liaison (Aaron Burton)
5. Elder Law Section (Patrick Thiessen)
6. Real Estate Section Liaison (Chad Rounds)
7. Family Law Section Liaison (Kim Willoughby)
8. Statutory Revisions Committee (Hayley Lambourn)
9. Legislative Liaison (Steve Brainerd and Leia Ursery)
10. Legislative Update (Tyler Mounsey)
11. Council Notes (Kristin Dittus)
12. CLE/Estate Planning Retreat (Dylan Metzner)
13. Orange Book Forms Committee (Marianne Luu-Chen)
14. Supreme Court's Rules and Forms Committee (Leia Ursery)
15. Civic and Community Affairs Joint Committee of the Elder Law Section (Sandra Sigler)
16. Justice Equity, Diversity, and Inclusivity Committee (Amber Marchlowska)
17. Probate Trial and Procedures Committee (Tammy Conover & Andrew Rogers)
18. Colorado Estate Planning Handbook (David Johns)

19. Green Book (Josie Faix)
20. Trust & Estate Practice Support Committee (Margrit Parker or Caroline Young)
21. The Colorado Lawyer (Emily Bowman & David Kirch)
22. Communications Representative/Ambassador Program (Kayla Nelson)
23. Board of Governors Representative (Jonathan Haskell)
24. Miscellaneous/FYI
25. Adjournment

Council of the Trust and Estate Section of the Colorado Bar Association
Minutes of the January 3, 2024, Meeting

Council met on December 6, 2023, via audio-conference. The meeting was called to order at approximately 3:15 p.m. by Lauren Da Cunha, Chair.

The following members of Council participated remotely and constituted a quorum:

Lauren Da Cunha, Chair
Dylan Metzner, Vice Chair
Lindsay Andrew (Second-Year Member)
Kelianna Chamberlain (Second-Year Member)
Margot Edwards (Second-Year Member)
Jodie Gilbert (First-Year Member)

1. Review/approval of December 6, 2023 Minutes.
 - a. The Minutes were approved unanimously.
2. Chair's Report and Administrative Matters (Lauren Da Cunha)
 - a. Lauren is working on the welcome letter for the Section with goal of having a draft for council's review in March.
 - b. Lauren is working on the nominating committee for 2024-2025 Council Members and Officers.
3. Secretary/Treasurer's report (Jonathan F. Haskell)
 - a. No report.
4. Tax Section Liaison (Aaron Burton)
 - a. Tax Section Happy Hour will be on January 31, 2024 at 5:00pm at Coohills on 14th and Wewatta.
5. Elder Law Section (Patrick Thiessen)
 - a. Sandra Sigler reported that Jonathon Culwell will be presenting at Colorado Guardianship Association Meeting on January 9th and will provide an update on Mental Health rules that are now in effect and Kate Seal mentioned that Kirkland and Seal has dissolved.
6. Real Estate Section Liaison (Chad Rounds)
 - a. No report, Real Estate Section did not meet in December.
7. Family Law Section Liaison (Kim Willoughby)
 - a. No report.
8. Statutory Revisions Committee (Hayley Lambourn and Marianne Luu-Chen)
 - a. Lodged Wills was picked up by the legislature.
 - b. Uniform Healthcare Decisions Act is tabled for the time being.
9. Legislative Liaison (Steve Brainerd and Leia G. Ursery)

- a. Moving forward with healthcare decision act.
 - b. Lodged Wills is moving forward into drafting.
 - c. Still looking for sponsors on other cleanup bills.
10. Legislative Update (Tyler Mounsey)
 - a. No report.
11. Council Notes (Kristin Dittus and Molly Zwerdlinger)
 - a. Last edition included a great article on Trust Article.
 - b. Looking for an article for March.
12. CLE/Estate Planning Retreat (Dylan Metzner)
 - a. Estate Planning Retreat proposals selection process has completed. There will be 10 Large Group Sessions which will each be recorded and available virtually. 2 of the Large Group Sessions will be plenary sessions. One plenary session on AI and another plenary session will have an diversity focus. The remaining 8 Large Group Sessions will be break-out sessions. Each Large Group session will only be offered once, but attendees will be able to access recordings of all Large Group Sessions. There will be 4 small group sessions with more of an interactive focus and these will all be breakout sessions. Small group sessions 1 and 2 will be offered on Friday during the 1st breakout and again the 2nd breakout and Small group sessions 2 and 3 will be offered on Saturday during the 1st breakout and again during the 2nd breakout.
 - b. We have February's Lunch and Learn CLE on February 6th. Angela Schmitz (suggested by Chad Rounds, thank you) will be presenting on Selling Decedent's Home: Real Estate Issues and Best Practices for Selling or Distributing Residential Real Estate.
 - c. We are finalizing the Lunch and Learns for March, April and May.
 - d. Working on Spring Update. A subcommittee will be meeting on Thursday 1/4 to discuss.
13. Orange Book Forms Committee (Marianne Luu-Chen)
 - a. Drop-in retirement trust forms 1450 and article on suggested beneficiary designation language.
 - b. Disposition of last remains will be addressed in February.
14. Supreme Court's Rules and Forms Committee (Leia Ursury)
 - a. No update.
15. Civic and Community Affairs Joint Committee of the Elder Law Section (Kayla Nelson on behalf of Sandra Sigler)
 - a. Meetings are at 1:30pm on Wonderful Wednesday's (Probate Day).
 - b. Senior Law Handbook Fundraising is starting.
 - c. Request for T&E Section contribution for the 2024 edition and asking for a \$3,000 contribution which is \$500 more than 2023's contribution. 3,300-5,000 handbooks are handed out to the public in the next year.
 - i. Motion duly made and seconded to contribute \$3,000 for the Elder Law Handbook. Motion passed unanimously.

16. Justice Equity, Diversity, and Inclusivity Committee “JEDI” (Amber Marchlowska)
 - a. Day of service will be April 20, 2024 and a Save the Date will be going out shortly.
 - b. January 23, 2024 CU Practitioner Lunch.
 - c. DU Coffee with Practitioner. Between 8 and 9am and likely will be occurring on Probate Days in February and March. Students would like to prepare a draft email to send out to T&E Section. Students have taken complete ownership of this. Amber will review email before it gets sent out to the T&E Section.
 - d. DU has also been very receptive to Silver Tsunami and confirmed they are able to host this event on February 27th.

17. Probate Trial and Procedures Committee (Lindsey Andrew)
 - a. No update
 - b. Informal Bench Bar will occur again in February’s Probate Day.

18. Colorado Estate Planning Handbook (David Johns)
 - a. No report

19. Green Book (Josie Faix)
 - a. No report

20. Trust & Estate Practice Support Committee – “TEPS” (Caroline Young)
 - a. TEPS will be having their first social during the February meeting. Emma will send information to the Section. Kim Willoby will be presenting on prenuptial agreements and their interface with estate planning followed by a social at 4:00pm.

21. The Colorado Lawyer (Emily Bowman & David Kirch)
 - a. No report

22. Communications Representative/Ambassador Program (Kayla Nelson)
 - a. Job fairs with the schools are set. March 5th for CU and March 6th for DU.

23. Board of Governors Representative (Jonathan F. Haskell)
 - a. No report

24. Other Business
 - a. None

ADJOURNMENT

The meeting was adjourned at 3:58 p.m. The next Council meeting will be held February 7, 2024.

Respectfully submitted

/s/ Dylan H. Metzner, Vice Chair

KIRCH ROUNDS BOWMAN & DEFFENBAUGH PC
MEMORANDUM

TO: CBA Council of the Trust and Estate Section

FROM: Chad Rounds

RE: Summary of 01/16/24 CBA Real Estate Section Council Meeting

DATE: 01/16/24

I attended the CBA Real Estate Section Council ("RESC") meeting on 01/16/24 by Zoom. The following is my report on matters addressed which the CBA Trust and Estate Section Council ("TESC") might find of interest:

#1) I encouraged the RESC to attend the CBA CLE Luncheon on "Selling Decedent's Home" sponsored by the T&E Section. It will be on February 6, 2024 and presented by Angela Schmitz. This type of transaction nicely blends both areas of law. The plan is for a notice of this CLE to be sent out to all Real Estate Section members in the coming days. Hopefully, there will be a large turnout.

#2) The Colorado legislature is now in session. Regarding real estate, there is already a new landlord/tenant bill to regulate the practice of using algorithms for setting rents - potential violations of unfair trade and anti-trust laws. Also, there are new HOA bills and affordable housing bills, as well as a treasurer's deed bill. The deed bill is in response to the 2023 U.S. Supreme Court's decision on the unconstitutionality ("takings") of certain types of treasurer's auctions.

#3) Adam Hirsch will be serving as a new member of the Title Standards Committee. He will bring a bankruptcy perspective to the group.



COLORADO BAR FOUNDATION

2024 SPONSOR PACKET

Elevate your organization's recognition among the Colorado legal community and reach new potential clients while supporting our great work. Our packages include free VIP tickets for your group and the opportunity to support the Colorado Bar Foundation's charitable mission.



Our Event Audiences

Our events host lawyers, judges, and prestigious members of the legal community representing the entire state of Colorado. Guests from the Foundation’s non-profit fund recipients are also invited, highlighting the quality programming supported by our grants.

[About the Colorado Bar Association](#).....page 3
[Spring Event: Cajun Feast & Fundraiser](#).....page 4
[Fall Event: Bar Fellows Dinner & CBA Award of Merit Celebration](#).....page 6

**Click here to reserve
your sponsorship today!**

Or visit:



Special offer: Receive a 10% discount off your total cost when you sponsor both events by March 1!

Choose One Event or Both!

SPRING EVENT Cajun Feast & Fundraiser

About the Event

Come and join us as we bring a New Orleans tradition to Colorado at our Cajun Feast & Fundraiser! Join us for an evening of Cajun cuisine prepared by our very own Bar Fellows President Keith Lapuyade. The night wouldn't be complete without drinks, mocktails, and dancing to the lively music of the Royal Street Ramblers. It will feel like you're on the bayou when you join us on June 14 at the Washington Park Boathouse, a beautiful venue sporting scenic views.



Cajun Feast Sponsor Packages

Each package listed below includes the following benefits:

- Your logo displayed in event invitation emails distributed to 14,000+ members of the Colorado legal community
- A thank you including your logo in Colorado Bar Association social media outlets with a combined following of over 10,000
- A thank you including your logo in the Loop eNewsletter publication distributed all Colorado Bar Association members
- Your logo displayed on event poster signage with sponsor recognition
- Your logo displayed on the Colorado Bar Foundation website
- Live on-stage shout out from the emcee

Patron Sponsor—\$5,000 (Only one available)

- Ten tickets to the event
- Opportunity to provide live welcome remarks during the event program
- Option to host a company-branded table that guests may visit in our event space
- Option to distribute your company-branded swag to event guests
- Recognition on all tables and event signage as the sole Patron Sponsor

Beverage Sponsor—\$2,000 (Only one available)

- Five tickets to the event
- Your logo displayed on the complimentary beverage tickets provided to each guest

Wristband Sponsor—\$2,000 (Only one available)

- Five tickets to the event
- Your logo displayed on the entry wristband worn by each guest

Jazz Sponsor—\$2,000 (Only one available)

- Five tickets to the event
- A verbal shout out from The Royal Street Ramblers
- Your logo prominently displayed on a poster thanking you for providing the evening's entertainment

Feast Sponsor—\$2,000 (Only one available)

- Five tickets to the event
- Your logo prominently displayed on a poster thanking you for providing the evening's Cajun feast

Event Sponsor—\$1,000

- Five tickets to the event

Please note that due to the exchange of goods (event tickets) and services (advertising perks), sponsorship offerings are not tax-deductible. Please contact eakalin@cobar.org to discuss alternate gift options for deductibility considerations.

Cajun Feast Tickets and Donations

Support Colorado Bar Foundation programming and network with potential clientele by purchasing event tickets or by making a direct tax-deductible donation. All individual ticket holders will enjoy an open seating environment.

Individual Tickets

- \$85 (suggested donation) members of the CBA Young Lawyers Division and their household.
- \$100 (suggested donation) General Admission.
- Tax-Deductible Donations can be made **online** at any time.

FALL EVENT

Bar Fellows Dinner & CBA Award of Merit Celebration

About the Event

The Bar Fellows Dinner is an evening of celebration and recognition of the Foundation's loyal supporters. The dinner also hosts the presentation of the CBA's Award of Merit, which is the most prestigious award dedicated to individuals in the Colorado legal community.

Our dinner will take place on Saturday, October 26 at the History Colorado Center, a beautiful venue celebrating Colorado's culture and history.



Bar Fellows Dinner Sponsor Packages

Each package listed includes the following benefits:

- Your logo displayed in event invitation emails distributed to 14,000+ members of the Colorado legal community
- A thank you including your logo in Colorado Bar Association social media outlets with a combined following of over 10,000
- A thank you including your logo in the Loop eNewsletter publication distributed all Colorado Bar Association members
- Your logo displayed on event poster signage with sponsor recognition
- Your logo displayed on the Colorado Bar Foundation website
- Live on-stage shout out from the emcee
- A dedicated slide including your logo in the digital rotating display
- Option to purchase additional tickets at a discounted rate

Patron Sponsor—\$10,000 (Only one available)

- 10-person table with premium seating
- Opportunity to submit a brief video message from your company, to be included in event invitation materials
- Option to host a company-branded table that guests may visit in our event space
- Full-page ad in the printed award program provided to each guest

Diamond Sponsor—\$8,000

- 10-person table with premium seating
- Option to host a company-branded table that guests may visit in our event space
- Half-page ad in the printed award program provided to each guest

Gold Sponsor—\$6,000

- 10-person table with premium seating
- Quarter-page ad in the printed award program provided to each guest

Grantee Sponsor—\$4,000

- 10-person table with reserved seating
- Your logo included in the printed award program provided to each guest

Foundation Friend—\$2,000

- 5-person half table reserved seating
- Please note: two Foundation Friend sponsors may share one table
- Your logo included in the printed award program provided to each guest

Please note that due to the exchange of goods (event tickets) and services (advertising perks), sponsorship offerings are not tax-deductible. Please contact eakalin@cobar.org to discuss alternate gift options for deductibility considerations.

Bar Fellows Dinner Tickets and Donations

Support Colorado Bar Foundation programming and network with potential clientele by purchasing event tickets or by making a direct tax-deductible donation. All individual ticket holders will enjoy an open seating environment.

Individual Tickets

- \$100 Bar and Emeritus Fellow and their household.
- \$125 General Admission.
- Tax-Deductible Donations can be made online at any time.

Colorado Bar Association
Trust & Estate
For the Seven Months Ending January 31, 2024

		January	YTD	Budget	Variance	%	Last FY
Beginning balance	01-3160-31600		\$39,540.51		\$39,540.51	0%	\$43,092.16
Trust & Estate Section							
Revenue							
Dues Income Section	01-4050-31600	420.00	32,010.00		32,010.00	0%	32,445.00
Registration Income	01-4501-31600		2,460.00		2,460.00	0%	2,280.00
Total Revenue Trust & Estate Sect		420.00	34,470.00		34,470.00	0%	34,725.00
Expenses							
Other Expense	01-5000-31600		(1,015.00)		(1,015.00)	0%	(1,000.00)
AWARDS	01-5007-31600		(6,000.00)		(6,000.00)	0%	(28.54)
Travel	01-5102-31600		(10.12)		(10.12)	0%	
Meals (Not travel related)	01-5491-31600		(1,933.28)		(1,933.28)	0%	(9,068.63)
Printing	01-5492-31600		(148.36)		(148.36)	0%	
Administration Fee	01-5494-31600	(1,116.21)	(7,813.47)		(7,813.47)	0%	(7,772.66)
Grants/Contributions	01-5500-31600	(5,000.00)	(6,750.00)		(6,750.00)	0%	(5,750.00)
Total Expenses Trust & Estate Sec		(6,116.21)	(23,670.23)		(23,670.23)	0%	(23,619.83)
Statutory Revisions Committee							
Revenue							
Rev. Elderlaw Joint Task Force							
Rev. Uninform POA Act							
Rev. Uniform Trust Code							
Expenses							
Exp. Elderlaw Joint Task Force							
Exp. Uninform POA Act							
Exp. Uniform Trust Code							
CLE							
Revenue							
Revenue Joint CLE							

Colorado Bar Association
Trust & Estate
 For the Seven Months Ending January 31, 2024

	January	YTD	Budget	Variance	%	Last FY
Revenue CLE Retreat						
Revenue CLE Section Only						
Expenses						
Expenses Joint CLE						
Expenses CLE Retreat						
Expenses CLE Section Only						
Council Notes						
Revenue						
Expenses						
Community & Civic Affairs						
Revenue						
Contributions 01-4500-31613					0%	\$3,500.00
Total Revenue Community & Civic					0%	3,500.00
Expenses						
Rules & Forms Committee						
Revenue						
Expenses						
Orange Book Forms						
Revenue						
Expenses						
Local Liaison						
Revenue						
Expenses						
Uniform Trust Code						
Revenue						

Colorado Bar Association
Trust & Estate
 For the Seven Months Ending January 31, 2024

	January	YTD	Budget	Variance	%	Last FY
Expenses						
Transfer Deposits						
Revenue						
Expenses						
Admin. Chair						
Revenue						
Expenses						
Estate Planning Handbook						
Revenue						
Expenses						
Admin Council Dinner						
Revenue						
Expenses						
Legislative Liaison						
Revenue						
Expenses						
Internet Editor						
Revenue						
Expenses						
Technology Committee						
Revenue						
Expenses						
Real Estate Liaison						
Revenue						

Colorado Bar Association
Trust & Estate
For the Seven Months Ending January 31, 2024

		January	YTD	Budget	Variance	%	Last FY
Expenses							
Green Book							
Revenue							
Expenses							
The Colorado Lawyer							
Revenue							
Expenses							
T&E Diversity Committee							
Revenue							
Misc Income	01-4299-31628					0%	\$1,000.00
Total Revenue Diversity Committe						0%	1,000.00
Expenses							
Judicial Liaison							
Revenue							
Expenses							
Meals (Not travel related)	01-5491-31615	(94.70)	(94.70)		(94.70)	0%	
Total Expenses Judicial Liaison		(94.70)	(94.70)		(94.70)	0%	
Member Vouchers							
Expenses							
T&E Young Lawyer Society							
Revenue							
Expenses							
Beginning Balance	01-3160-31600		39,540.51		39,540.51	0%	43,092.16
Total Revenue All Sources	01-4???-316??	420.00	34,470.00		34,470.00	0%	39,225.00
Total Expense All Sources	01-5???-316??	(6,210.91)	(23,877.61)		(23,877.61)	0%	(23,619.83)
Ending Balance		(5,790.91)	50,132.90		50,132.90	0%	58,697.33