

**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, February 6, 2024, 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

**REMINDER –MAGISTRATE BRYCE ALLEN FROM THE 1<sup>st</sup> JUDICIAL DISTRICT  
(JEFFERSON COUNTY)WILL BE PRESENTING AT 10:30.**

2. Review of Minutes from January 3, 2024.
3. Chair’s Report – Tammy Conover and Andrew Rogers
4. Updates/Reports from current committees:
  - a. E-Wills Committee – Letty Maxfield
  - b. Wrongful Death Subcommittee – Aaron Evans
  - c. Court Visitor Subcommittee – Aaron Evans (should this be tabled?)
  - d. UPL – Tammy Conover/Susie Germany
    - i. In-person drafting meeting was January 19<sup>th</sup>
    - ii. Next meeting will be March 1<sup>st</sup>, 11 – 12:30, CFPD Offices (hybrid). 1355 S. Colorado Blvd., Suite 920. Zoom went out, let Tammy know if you did not receive it.
  - e. Mandatory Mediation and Simplified Procedure in Probate Cases – Spencer Crona
  - f. County Bench Bar Meetings – Angela Rockwood
    - i. Magistrate Allen to present Wednesday February 7<sup>th</sup>
      - April 3<sup>rd</sup> – 20<sup>th</sup> Judicial District, Judge Collins

5. UGCOPPA – Letty Maxfield & Andrew Rogers. Joint T&E, Reporting updates.

**NEXT MEETING: March 6, 2024 @ 10 a.m.**

**REMINDER: Join the Committee through CBA Membership Department, email [tammy@conoverlawllc.com](mailto:tammy@conoverlawllc.com) for monthly updates.**

# Probate Trial and Procedure Committee

## Minutes of the January 3, 2024, Meeting

The Probate Trial and Procedure Committee met virtually through the Colorado Bar Association on January 3, 2024. The meeting was called to order at approximately 10:00 a.m.

The following members participated by Zoom:

Lindsay Andrew	Aaron Evans	Brian Reynolds
Eric Apjoke	John Ferguson	Angela Rockwood
Lauren Beversluis	Leah Gates	Tom Rodriguez
Lisa Blattner	Susie Germany	Andrew Rogers
Tim Bounds	David Imbler	Al Sahlstrom
Norv Brasch	Stan Kent	Zach Schlichting
Lynne Bruzzese	Keith Lapuyade	Catherine Seal
Annie Campbell	Kimberly Lavin	Kathy Seidel
Kelly Campbell	Marianne Luu Chen	Sandra Sigler
Geoffrey Carpenter	Victoria Long	Sara Stein
Shari Caton	Letty Maxfield	Rubea Taylor
Scott Challinor	Emily McDaniel	Tamara Trujillo
Marco Chayet	Nick McWharter	Herb Tucker
Molly Clarke	Sydney Merrel	Chelsea Ziegler
Tammy Conover	Kevin Millard	Kris Zumalt
Kelly Cooper	Kayla Nelson	Lisa Dunn
Lisha Coultrip	Matthew Perkins	Stephen Wilson
Spencer Crona	Sara Price	Morgan Wiener
Kaitlin Davis	Sal Quintana	
	Jesse Rember	

Welcome/Introductions

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

### **I. Chair's Report**

- Annual Holiday Party went great. Thanks to Norv for putting together, as well as our panel Judge Leith, Judge Kramer, and Judge Vriesman.

### **II. Updates/Reports**

- Statutory Revisions for E-Wills – No update.
- Wrongful Death Subcommittee – Committee will meet again in February, date TBD. Working on draft of WD statute incorporating language we like from other states.
- Court Visitor Subcommittee – No update.

- Unauthorized Practice of Law – Next meeting is on January 19, 2024, then Feb 2, 2024, both at CFPD offices (2 hours, in person). Working on narrowing down talking points in terms of what we want to get to OARC. Research ongoing into other states' approaches.
- Mandatory Mediation / 16.1 Committee – Spencer gave update.
- County Bench Bar – Angela Rockwood
  - February 7<sup>th</sup> from 10:30-11am: 1<sup>st</sup> Judicial District, Magistrate Allen (potentially Judge Vriesman as well – he will confirm later in January 2024)
  - March 6<sup>th</sup> from 10:30-11am: 19<sup>th</sup> Judicial District, Magistrate Apostoli (tentative will confirm later in January 2024 whether it will be her or another judicial officer)
  - April 3<sup>rd</sup> from 10:30-11am: 20<sup>th</sup> Judicial District, Judge Collins
- UGCOPPA – Andrew Rogers gave update. Continuing to meet every Friday 1:00-3:00 p.m., virtually and in person at Wade Ash, reading through the Act and issue spotting. Stakeholders' Q&A session set for Thursday January 11, 2024, don't know where it is yet, may be virtual only.

### **III. New Business**

- a. Sandra Sigler – Tuesday, January 9, 2024 – Jonathan Culwell going to present, going to be talking about the legislation/changes in for mental health law. – At CoFund for People with Disabilities.

### **IV. Adjournment**

The meeting adjourned at approximately 10:25 a.m.