

**Council of the Trust and Estate Section of the Colorado Bar Association  
Notice of and Agenda for the December 6, 2023, Meeting**

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

From: Jonathan F. Haskell  
Secretary/Treasurer  
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**Notice of Meeting**

The next monthly meeting of the 2022-2023 Council of the Trust and Estate Section of the Colorado Bar Association will be held:

Date and time: **Wednesday, November 1, 2023, 2:30 p.m.**

Place: 1290 Broadway, Suite 1700, Denver, CO 80203 Room West 1  
or Call-In/Zoom

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

Meeting ID: 838 4374 1966

Passcode: 534100

Call-in: 16694449171

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**Minutes of Previous Meetings & Attachments**

1. Minutes of the November 1, 2023 meeting of the Council
2. October Financial Statements

**Trust and Estate Section Council Agenda  
December 6, 2023**

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 November 1, 2023 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

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## Executive Council Meeting Notes for November 7, 2023

Meeting comes to order at 6:00pm by Joyce Akhahenda, Chair - CBA Criminal Law Section

- I. Executive council members approve minutes from October 3<sup>rd</sup> meeting.
- II. Financial Report - Emma Baxter provides report on section's budget and notes an increase of \$9,002.40 from payment of dues. Ending balance of \$25,712.34.
- III. Old Business – None
- IV. CLE – Criminal Law Update
  - a. Jody Davis provides update on CLE to the members. She reports 35 in-person attendees and 50 attendees appearing online.
  - b. Reception after event included chips and beer, attended by some, but most went home after conclusion of CLE.
  - c. Twenty-five people have downloaded the CLE on demand.
  - d. Forty-four scholarships approved for distribution by members.
  - e. Total of \$3700.00 awarded for tuition coverage, this amount will be taken from section's budget.
- V. New Business
  - a. CODACC sponsorship request for the Class of 2024
    - i. Discussion of program, benefits, and contribution to the broader Colorado legal community.
    - ii. Program is one year and includes monthly events of four cohorts.
    - iii. Request from the Criminal Law Section is a sponsorship in the amount of \$2,000.00.
    - iv. Chair, Joyce Akhahenda moves to sponsor a criminal law section member. Brief discussion in support of the sponsorship by members and approved. Members approve sponsorship request with no opposition.
- VI. Next Meeting on Tuesday, December 5<sup>th</sup> at 6pm– Virtual Only.



9:00-10:00 a.m.

**Elder Law Section Meeting**

- Chair: Emily McDaniel
- Staff Contact: Juliann Tricarico
- East room

<https://cba-cle.zoom.us/j/81010370491?pwd=Qy9jSzEwZ0ZwOENwS2tDbEJycVVIQT09>

Meeting ID: 810 1037 0491

**Passcode: 314653**

Call in

+ 1 719 359 4580 US

9:00-10:00 a.m.

**Retirement Assets Subcommittee**

- Chair: Tim Bounds
- Staff Contact: Emma Baxter
- **Virtual Attendance Only**

<https://cba-cle.zoom.us/j/83041212814?pwd=QTA5WlkvSDFqcHNBNVhidmZOWEw0Zz09>

Meeting ID: 830 4121 2814

Passcode: 053437

Call-in: 16694449171

10:00-11:00 a.m.

**Probate Trial & Procedure**

- Chair: Tammy Conover and Andrew Rogers
- Staff Contact: Emma Baxter
- West room

Materials can be found at: <https://www.cobar.org/For-Members/CBA-Sections/Trust-Estate/Committees/Probate-Trial-and-Procedure-Committee-litigation>

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

Meeting ID: 895 5477 9264

Passcode: 043692

Call-in: 12532158782

10:00-11:00 a.m.

**Elder Law Section CLE Program**

- Chair: Emily McDaniel
- Staff Contact: Juliann Tricarico
- East room

<https://cba-cle.zoom.us/j/81010370491?pwd=Qy9jSzEwZ0ZwOENwS2tDbEJycVVIQT09>

Meeting ID: 810 1037 0491

**Passcode: 314653**

Call in

+ 1 719 359 4580 US

11:00-12:00 p.m.

**Trust and Estates JEDI Committee**

- Chair: Amber Marchlowska
- Staff Contact: Emma Baxter
- West room

<https://cba-cle.zoom.us/j/82658637700?pwd=eXk5Z3I4OVg4Y2NYRHNwK0NMBzdVUT09>

Meeting ID: 826 5863 7700

Passcode: 689366

Call-in: 12532158782

11:00-12:00 p.m.

**Elder Law Executive Committee**

- Chair: Emily McDaniel
- Staff Contact: Juliann Tricarico
- East room

<https://cba-cle.zoom.us/j/81010370491?pwd=Qy9jSzEwZ0ZwOENwS2tDbEJycVVIQT09>

Meeting ID: 810 1037 0491

**Passcode: 314653**

Call in

+ 1 719 359 4580 US

12:00-1:30p.m.

**CLE T&E Committee**

- ☐ Chair: Dylan Metzner
- ☐ Staff Contact: Emma Baxter
- ☐ South 2

<https://cba-cle.zoom.us/j/86427357623?pwd=b3VjUUdBYXA4emVyNzRoVExWVjVXZz09>

Meeting ID: 864 2735 7623

Passcode: 818351

Call-in: 17193594580

12:00-1:30 p.m.

**Orange Book Forms**

- Chair: Marianne Luu-Chen
- Staff Contact: Lisa Travis Fischer
- West room

Materials can be found at: <https://cobar.org/For-Members/CBA-Sections/Trust-Estate/Committees/Orange-Book-Forms-Committee-->

<https://cba-cle.zoom.us/j/81482412216?pwd=VIQwTU5VcGpIVGdtTEp5dit1bzVuZz09>

Meeting ID: 814 8241 2216

Passcode: 647728

Call in: 1 253 215 8782

1:30-2:30 p.m.

**Civic & Community Affairs**

- ☐ Chair: Sandra Sigler
- ☐ Staff Contact: Emma Baxter
- ☐ South 2

Materials can be found at: <https://cobar.org/For-Members/CBA-Sections/Trust-Estate/Committees/Civic-and-Community-Affairs-Committee>

<https://cba-cle.zoom.us/j/89785436391?pwd=KOFITIBzRONzZzIYMhJHUTBsNEtEQT09>

Meeting ID: 897 8543 6391

Passcode: 143824

Call-in: 13462487799

1:30-2:30 p.m.

**Statutory Revisions Committee**

- 📄 Chair: Hayley Lambourn and Marianne Luu-Chen
- 📄 Staff Contact: Emma Baxter
- 📄 West room

Materials can be found at: <https://cobar.org/For-Members/CBA-Sections/Trust-Estate/Committees/Statutory-Revisions-Committee>

<https://cba-cle.zoom.us/j/85876806420?pwd=dEVQRlEvYWl1ZGRtM3h6cHdNRDFHUT09>

Meeting ID: 858 7680 6420

Passcode: 043374

Call-in: 12532158782

2:30– 4:00 p.m.

**Trust & Estate Council**

- Chair: Lauren Da Cunha
- Staff Contact: Emma Baxter
- West Room

Materials can be found at: <https://cobar.org/For-Members/CBA-Sections/Trust-Estate/T-E-Executive-Council>

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

Meeting ID: 838 4374 1966

Passcode: 534100

Call-in: 16694449171

3:00- 5:00 p.m

**T&E Practice Support Committee (TEPS)**

- 📄 Chair: Caroline Young
- 📄 Staff Contact: Emma Baxter
- 📄 South 2

<https://cba-cle.zoom.us/j/83887850423?pwd=NC9ydHczKzBsZkoxTWpkc3RkbGVwZz09>

Meeting ID: 838 8785 0423

Passcode: 030104

Call-in: 13462487799

**KIRCH ROUNDS BOWMAN & DEFFENBAUGH PC**  
MEMORANDUM

**TO:** CBA Council of the Trust and Estate Section

**FROM:** Chad Rounds

**RE:** Summary of 11/21/23 CBA Real Estate Section Council Meeting

**DATE:** 11/29/23

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I attended the CBA Real Estate Section Council ("RESC") meeting on 11/21/23 by Zoom. The following is my report on matters addressed which the CBA Trust and Estate Section Council ("TESC") might find of interest:

#1) The RESC had a moment of reflection on the passing of Gary Abrams who led the CBA-CLE for many years. There will be a celebration of his life at the CBA offices in December.

#2) The RESC voted to pledge \$3,000 to Colorado Diverse Attorney Community Circle. The program seeks to build a community for diverse Colorado attorneys. The funds will be used to pay for educational retreats for participating attorneys.

#3) The RESC voted to pledge \$2,500 to Greater Colorado Law Student Experience. It is an immersive summer program for Colorado Law and Denver Law students designed to introduce students to life and legal practice in Colorado's rural communities. Students spend eight weeks of the summer living and working in rural Colorado while participating in externships. The program provides each student with a \$3,400 living stipend. The goal is to have students live and work in rural Colorado as attorneys after graduation in order to address the current legal desert facing many rural communities.

#4) The RESC discussed preparing a Colorado Lawyer article in collaboration with the CBA Business Section and CBA Trust & Estate Section on the new FinCEN reporting requirements for entities.

#5) There has been a recent stir in the realtor community after rulings in antitrust litigation raised questions about the legality of realtors' percentage commission structure.