

NOTICE OF MEETING

COMMITTEE ON RULES AND FORMS TRUST AND ESTATE SECTION OF THE COLORADO BAR ASSOCIATION

To: Members of the Rules and Forms Committee

**THE NEXT MEETING WILL BE DECEMBER 19, 2013
11:00 A.M. TO 12:15 P.M.**

LUNCH WILL BE PROVIDED TO THOSE WHO ATTEND

**Location:
COLORADO BAR ASSOCIATION
9th Floor, Executive Conference Room (Please check board on arrival)
1900 Grant Street, Suite 900
Denver, CO 80203-4309
303-860-1112**

**If you are unable to attend the meeting in person but would like to participate by phone,
please dial 866-220-5786 and enter conference ID 3038245321#**

AGENDA FOR NOVEMBER 21, 2013 MEETING

1. Welcome and introductions
2. Approve minutes from last meeting.
3. Chair's Report - Laurie Hunter
Note that a small change was made to the discovery rule (Aaron explain)
4. Probate Advisory Committee - Tony Rodriguez
5. New business or requests
6. Subcommittee Reports
 - a. Rule 16. Sarah Golombeck, Aaron Evans and Marco Chayet
See attached proposed Rule, petition and order
 - b. Rule Revision - Kerri Klein
New Probate Rules were submitted to PAC for approval May 2013.
 - c. Notice Rules - Gordon Williams
International parties and notice when conservator and PR are the same

person

- d. Trial and Procedure Committee – New Nonappearance Hearing Procedure
- David Kirch, Theresa Moore and Kelly Cooper.

7. Current Issues

- a. JDF 800 – Acknowledgment of Responsibilities; See attached PDF of proposed changes.
- b. JDF 960 and 964: Petition and Order for Final Settlement - See attached PDF of proposed changes.
- c. JDF 821 - Acceptance of Appointment by Written Instrument by Guardian - not consistent with statute? Effective July 2009, witnesses and notary no longer required on a written statement appointing a guardian. (See attached proposed change).
- d. 60 and 90 day periods for reports: not the same for guardians and Inventory and Financial plan (Kelly Cooper) (See attached proposed change)