

**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, October 4, 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 September 6, 2023.
3. Chair's Report – Tammy Conover and Andrew Rogers
 - a. Email addresses and content locations
 - b. Future court “invitations” – County Bench Bar Meetings – Tammy will be working on this (still, unless someone wants to take this on?)
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. Notes from first meeting on with materials
 - ii. Meetings will be by Zoom, **last Tuesday of the month at 11am**. December will be 3rd Tuesday
 - e. Mandatory Mediation and Simplified Procedure in Probate Cases – Spencer Crona
 - f. **Review/Revisions to Probate Code from UPC Updates** – Letty Maxfield & Andrew Rogers

5. “Suspended” Committees
 - a. Virtual Court Proceedings – Norv Brasch
6. New Business
 - a. Holiday Party – save the date! December 6th, 4pm

NEXT MEETING: October 4, 2023 @ 10 a.m.

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

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=eXk5Z3I4OVg4Y2NYRHwK0NMBzdVUT09>

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=K0FITIBzR0NzZzIYMhJHUTBsNEtEQT09>

Meeting ID: 897 8543 6391

Passcode: 143824

Call-in: 13462487799

1:30-3:15 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

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

3:15– 5:00 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