

## AGENDA

Meeting of the Elder Law Section of the Colorado Bar Association  
Wednesday, September 4, 2024 — 9:00AM

### In-Person & Virtual

<https://cba-cle.zoom.us/j/81149365222?pwd=cDSe7HMJ2Dw3svpuKNgMG7qbTZRkIv.1>

Meeting ID: 811 4936 5222

**Passcode: 112345**

Call-in: +1 719 359 4580 US

1. Call to Order
2. Introductions
3. Call for review and approval of May 2024 minutes.
4. **Chair's Report** – Scott Challinor [scott@conoverlawllc.com](mailto:scott@conoverlawllc.com)
5. **Vice Chair's Report** – Cathleen Giovannini [Cathleen.Giovannini@denvergov.org](mailto:Cathleen.Giovannini@denvergov.org)
6. **Treasurer's Report** – Joe Hartwig [joe@siglerlawco.com](mailto:joe@siglerlawco.com)
7. **Old Business**
  - a. Committee Reports (Chairperson of the committee may report any current matters)
    - i. Civic and Community Affairs Committee:**

Contact/Chair: Sandra Sigler [sandra@siglerlawco.com](mailto:sandra@siglerlawco.com)  
Meeting: 1:30 p.m. to 2:30 p.m.  
Status/Project: Fundraising for Senior Law Handbook  
Membership Status: Open to new members.
    - ii. CLE and Publications Committee:**

Contact/Chair: Lisa Blattner [lisa@drexler.law](mailto:lisa@drexler.law) & Rachael Johnson  
[rachael@drexler.law](mailto:rachael@drexler.law)  
Meeting: None/participation via e-mail  
Status/Project: Contact Lisa with any ideas for CLE Presentations for 2024-25 session & Rose Mary Zapor seeking articles for *Colorado Lawyer*  
Membership Status: Open to new members
    - iii. Elder Law Retreat:**

Contact/Chair: Kayla Nelson, [kayla@siglerlawco.com](mailto:kayla@siglerlawco.com)  
Meeting: Virtually on the third Thursday of the Month at 11:30AM.  
Status/Project: 2025 Elder Law Retreat  
Membership Status: Open to new members
    - iv. Medicaid Committee:**

Contact/Chair: Virginia Frazer-Abel/Eric Kelly  
[Virginia@vfalegal.com](mailto:Virginia@vfalegal.com), [eric@vfalegal.com](mailto:eric@vfalegal.com)  
Meeting: Scheduled as needed by Chair/Co-Chairs  
Status/Project: Agenda pending

Membership Status: Looking for new members.

**v. Medicaid Legislative Committee**

Contact/Chair: Virginia Frazer-Abel/Eric Kelly

[Virginia@vfalegal.com](mailto:Virginia@vfalegal.com), [eric@vfalegal.com](mailto:eric@vfalegal.com)

Meeting: Scheduled as needed by Chair/Co-Chairs

Status/Project: Review

Membership Status: Looking for new members

**vi. Probate Trial & Procedure Committee:**

Contact/Chair: Tammy Conover/Andrew Rogers

[tammy@conoverlawllc.com](mailto:tammy@conoverlawllc.com), [Rogers@EvansCase.com](mailto:Rogers@EvansCase.com)

Meeting: 10:00-11:00

Status/Project: Ongoing

Membership Status: Open to new members.

**vii. Office of the Public Guardianship Committee:**

Contact/Chair: Carl Glatstein, [carl@denverprobatelaw.com](mailto:carl@denverprobatelaw.com)

Meeting: Via e-mail and/or telephone conference as needed

Status/Project: Grants, proposed legislation

Membership Status: Open to new members.

**viii. Mental Health Committee:**

Contact/Chair: Jonathan Culwell, [jbc@mhlawco.com](mailto:jbc@mhlawco.com)

Meeting: Via e-mail and telephone conference at this time

Status/Project: Review/consider proposed bills which address involuntary care, advanced psychiatric directives, and provisions for psychiatric care of wards and protected persons.

Membership Status: Open to new members.

**ix. Appellate Review and Response Subcommittee**

Contact/Chair: Scott Challinor, [scott@conoverlawllc.com](mailto:scott@conoverlawllc.com)

Meeting: Via email

Status/Project: Review appellate cases and decisions affecting the practice of Elder Law, coordinate response where appropriate and possible.

Membership Status: Open to new members

**b. Liaison Reports**

- i. Board of Governors:** Marco Chayet
- ii. Legislative Relations:** Tyler Mounsey
- iii. Trust and Estate Liaison:** Patrick Thiessen
- iv. SRC Liaison:** Rose Mary Zapor
- v. Outreach Coordinator:** Open position
- vi. Communications Representative:** David Imbler

- vii. **CBA Legislative Policy Committee Liaisons:** Shelby Martin / Lisa Blatner / Scott Challinor
- viii. **UTC Committee:** Michael Kirtland
- ix. **NAELA Colorado:** Marco Chayet
- x. **National Guardianship Association / Colorado Guardianship Association:** Sandra Sigler
- xi. **CBA Ethics Committee:** Michael Kirtland
- xii. **Probate Rules & Forms Committee:** Marcie McMinimee
- xiii. **CBA YLD Liaison:** Tori Long
- xiv. **JEDI Committee:** Amber Marchlowska

#### **8. New Business and Announcements**

Proposed (new) CUGPPA subcommittee to look into updates to current law to account for certain provisions of last year's UGCOPPA – Letty Maxfield

#### **10:00 A.M. CLE Presentation:**

##### **Considerations When Selecting a Trustee**

When you are advising your clients in selecting a Trustee/Pooled Trust Organization of a trust for a person with a disability or an older adult, there are many questions to ask and areas to consider. We will explore the questions and qualifications to evaluate from the perspective of an attorney and a trustee.

Presenters: Megan Brand, Executive Director, Colorado Fund for People with Disabilities and Nancy “Susie” Germany of the Germany Law Firm

#### **11:00 A.M. Executive Council Meeting**