

AGENDA FOR MAY 1, 2019

RULES AND FORMS DEEDS SUBCOMMITTEE MEETING

11:30 AM

Approve minutes from April 3, 2019 meeting

Discuss meeting time issue

Vote to approve final versions of Life Estate Deeds and Notes on Use.

Continue discussion of Conservator's Deed and Note on Use.

Review revised Notes on Use for Deeds in General

Review Statement of Authority

Discuss next steps

Are We There Yet? Just a note as to what we've accomplished and what we have left to do:

After today's meeting, the subcommittee should have approved final versions of:

- Life Estate Deeds and Notes on Use (likely approved 5/1/19)
- Beneficiary Deed, Revocation and Notes on Use (approved 4/6/19)
- Trustee Deed Note on Use (approved 10/18/18)

After today's meeting, we still need to finalize and complete:

- General Note on Use (pretty much complete)
- Conservator's Deed and Note on Use (getting there)
- Statement of Authority
- PR Deeds and Note on Use
- Bill of Sale and Note on Use
- Trustee Deed (Note on Use approved)

And, remember that once we have our documents in final form, we will need to submit them to the Real Estate Section. Also, we have been told that the Real Estate Committee is considering changes to the deeds statutes which could impact our work.