**CBA TRUST AND ESTATE SECTION**

**STATUTORY REVISIONS COMMITTEE**

**AGENDA**

**August 7, 2019**

1. **Introductions**

Chair Molly Zwerdlinger called the meeting to order at 1:38p.m. There were introductions from those in attendance and on the phone/online (Clara Brown Schaffer, Eugene Zuspann, Kelly Copper).

1. **Approval of May 1, 2019 Minutes**

The minutes from the May 1, 2019 meeting were unanimously approved.

1. **Announcements**

If you are interested in forming a subcommittee, please fill out the subcommittee form. Creation of subcommittees will be voted on by SRC. Reach out to Molly Zwerdlinger at [MZwerdlinger@m-s-lawyers.com](mailto:MZwerdlinger@m-s-lawyers.com) to get the updated form.

Frank Hill presented Bette Heller with the pen the Governor used to sign the Abandoned Estate Planning Documents bill into law.

1. **Legislative Report – Jeremy Schubach**

The legislature is not currently in currently in session. It is likely there will be several estate planning hot topics during this legislative session.

1. **SRC Approved Proposals**
2. **Active Matters - Work to Finalize Required**
3. **UTC Subcommittee (Connie Eyster, Co-Chair)**

The subcommittee continues to work on Part 5 (creditor rights) and will need to get other sections on board. They will likely be done by the end of the year.

1. **Inactive Matters Approved by SRC but Not Moving Forward for Various Reasons**

None at this time.

1. **Unapproved Matters under Consideration by SRC - Reports from Subcommittees**
   1. **Legislation Review Joint Subcommittee (Michael D. Holder, Chair)**

No report at this time.

* 1. **Advance Legislative Response Team (Marco Chayet and Letty Maxfield, Co-Chairs)**

No report at this time.

* 1. **ADR Legislation (C. Jean Stewart, Chair)**

No report at this time.

**d. Uniform Fiduciary Income and Principal Act Subcommittee (Gene Zuspann,**

**Chair and Georgine Kryda)**

The subcommittee got through §407. They should be done reviewing by the end

of the academic year.

e. Uniform Guardianship, **Conservatorship, and Other** Protective **Arrangements** Act (Brooke Brussel)

No report at this time.

**f. Child Support in Probate Subcommittee (Pat Mellen, Chair)**

No report at this time.

**g. Uniform Electronic Wills Act (Letty Maxfield and Herb Tucker, Co-Chairs)**

Gordon Williams gave the report for the subcommittee. The subcommittee is just getting started but assignments have been given out. There is no timeline for completion but will take at least a year. The subcommittee meets during First Wednesday from 12:30pm-1:30pm.

1. **Inactive Matters**

None at this time.

1. **Report from Elder Law Section**

None at this time.

1. **Report from Other Sections of the Bar**

None at this time.

1. **New Matters**

**a. Changes to Conservator’s Report (Lindsay Andrew)**

No report at this time.

**b. Witness Requirements in Advanced Directives (Carl Stevens)**

The subcommittee, which will meet virtually, was created by unanimous approval. The subcommittee would like to move quickly and have the proposal voted on at the next meeting of SRC. It is likely this will need to be run by other sections of the Bar as well.

**c. Revised Uniform Probate Code**

No call to create subcommittee at this time.

1. **Passed Proposals for Inclusion in Omnibus Bill or Stand Alone Legislation** 
   1. **Bankruptcy/Inherited IRAs (approved in 2015-2016)**
   2. **Changes to the Uniform Power of Appointment Act (approved in 2015-2016)**
   3. **Disclosure of Fiduciary Fees, §§ 15-10-602 and 15-12-705, C.R.S. (approved in 2015-2016)**

This was approved several years ago but was not brought forward at the time. Gordon Williams proposes that we prepare a bill. As SRC has already approved, we will need the reaffirmation of Council to move forward.

* 1. **Colorado Electronic Preservation of Abandoned Estate Planning Documents Act (formerly Deposit of Original Documents) Subcommittee (Timothy Bounds, Co-Chair, and Peter W. Bullard, Co-Chair)**
  2. **Uniform Directed Trust Act Subcommittee (Kevin Millard, Co-Chair, and Kelly Cooper, Co-Chair)**

Molly Zwerdlinger adjourned the meeting.

Respectfully submitted,

*/s/ Lauren Da Cunha*