

MINUTES OF THE FEBRUARY 3, 2020 MEETING
OF THE PROCEDURES REVIEW COMMITTEE

The following were in attendance at the meeting: Hon. Jennifer Berkenstock, Region #14, Chair; Hon. Kathleen N. Maxham, Fairfield; Hon. Robert A. Randich, Newington; Hon. Beverly Streit-Kefalas, Probate Court Administrator; Susan Meagher, Chief Clerk Berlin; Karen Parzych, Chief Clerk Madison-Guilford; Gale Pellegren, Chief Clerk Torrington Area; Loreen (Lori) Michalak, Chief Clerk Shelton; and Evan Brunetti, Heather Dostaler and Alison Green, and of the Office of the Probate Court Administrator.

The following were absent from the meeting: Hon. Diane Blick, Litchfield Hills; Hon. Barbara Gardner Riordan, Tolland-Mansfield; and Hon. Philip Wright, Wallingford.

Call to order: The meeting was called to order at 9:05am.

Old Business: None

New Business: The Committee reviewed, discussed and took action on new and revised forms as shown and evidenced on the attached schedule. The Committee agreed to continue discussion on changes to the decree related to SIJS Findings and the related Appointment of Voluntary Guardian; and also a proposed new form which would be used to request a single filing fee for multiple petitions. These matters will be revisited at the next Committee meeting.

The Committee will meet next on April 6, 2020.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at approximately 11:30.

Respectfully submitted,
Loreen Michalak
Loreen (Lori) Michalak,
Secretary

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**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON  
MONDAY, APRIL 6, 2020 AT 9:00AM  
IN THE LIBRARY AT PROBATE COURT ADMINISTRATION**

| PC #    | P/C | Form Name                                                                            | CMS | WEB | Suggested Change(s)/Action Taken                                                                                        | Date of Committee Review | Committee Action       |
|---------|-----|--------------------------------------------------------------------------------------|-----|-----|-------------------------------------------------------------------------------------------------------------------------|--------------------------|------------------------|
| PC-1605 | P   | Decree/Referral to Mediation by Court                                                | X   |     | Revisions relating to court's own motion; update Rule/Regulation references                                             | 2/3/2020                 | Approved;<br>2/3/2020  |
| PC-2107 | P   | Affidavit in Lieu of Administraiton to Settle Full Estate                            |     | X   | <b>TITLE CHANGE:</b> "Affidavit to Settle Full Estate"; review and revise for rule changes                              | 2/3/2020                 | Approved;<br>2/3/2021  |
| PC-213  | P   | Affidavit of Closing                                                                 |     | X   | Change signature to "Fiduciary"; review and revise for rule changes                                                     | 2/3/2020                 | Approved;<br>2/3/2022  |
| PC-287  | P   | Acknowledgment of Receipt of Specific Bequest                                        |     | X   | Review and revise for rule changes                                                                                      | 2/3/2020                 | Approved;<br>2/3/2023  |
| PC-3704 | P   | Acceptance of Appointment and Agreement of Conservator of Estate                     |     | X   | Review and revise form; Add acknowledgement for subject to criminal background check                                    | 2/3/2020                 | Approved;<br>2/3/2024  |
| PC-3705 | P   | Acceptance of Appointment and Agreement of Conservator of Person                     |     | X   | Review and revise form; Add acknowledgement for subject to criminal background check                                    | 2/3/2020                 | Approved;<br>2/3/2025  |
| PC-571  | P/C | Acceptance of Appointment and Agreement of Guardian of Estate of Minor               |     | X   | Review and revise form; Add acknowledgement for subject to criminal background check                                    | 2/3/2020                 | Approved;<br>2/3/2026  |
| PC-7705 | P/C | Acceptance and Agreement of Guardian of Person with Intellectual Disability          |     | X   | Review and revise form; Add acknowledgement for subject to criminal background check                                    | 2/3/2020                 | Approved;<br>2/3/2027  |
| PC-7706 | P/C | Agreement of Guardian of Person with Intellectual Disability Re: Financial Authority |     | X   | Review and revise form; Add acknowledgement for subject to criminal background check                                    | 2/3/2020                 | Approved;<br>2/3/2028  |
| PC-6607 | P/C | Decree/Special Immigrant Juvenile Findings                                           | X   |     | Review and revise findings                                                                                              | 2/3/2020                 | Tabled for<br>4/6/2020 |
| PC-5613 | P/C | Decree/Appointment of Voluntary Guardian Age 18 to 20                                | X   |     | <b>TITLE CHANGE:</b> "Decree/Appointment of Voluntary Guardian of Person Age 18 through 20"; Review and revise findings | 2/3/2020                 | Tabled for<br>4/6/2020 |

| PC #     | P/C | Form Name                                                                                         | CMS | WEB | Suggested Change(s)/Action Taken                                                                                                     | Date of Committee Review | Committee Action                 |
|----------|-----|---------------------------------------------------------------------------------------------------|-----|-----|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------|----------------------------------|
| New Form |     | Request/Order for Single filing fee for multiple petitions under Probate Court Rules of Procedure |     | X   | New form to alert the court when petitioner is requesting 1 fee for multiple petitions under rules of procedure                      | 2/3/2020                 | Tabled for 4/6/2020              |
| New Form | P   | Motion to Seal                                                                                    |     | X   | Discuss concept of new form                                                                                                          | 2/3/2020                 | No new form at this time.        |
| PC-286   | P   | Status Update Decedent's Estate                                                                   |     | X   | Discuss concept of making generic for matters where account excused                                                                  | 2/3/2020                 | No changes to form at this time. |
|          |     | Certifications                                                                                    |     | X   | Discuss concept of adding box to certifications and "Check here if one or more of the addresses of an interested party has changed." | 2/3/2020                 | Approved; 2/3/2028               |