

# **CONNECTICUT PROBATE ASSEMBLY**

## **CONTINUING EDUCATION COMMITTEE MEETING**

**November 14, 2018**

In attendance: Judges Becker, Blick, Brandt, Calabrese, DeGennaro, Elkin, Gardner-Riordan, Zelman and Attorney Bonnie Bennet

### **Preliminary Discussion re New Format for Continuing Education Programs**

After receiving comments/suggestions from participants in our continuing education seminars, Judge Becker proposed presenting more “judges only” seminars, in a similar vein to the “Judges Institute”, to focus on education topics and presentations to be most beneficial to judges and to encourage more discussions. The roundtable presentations are most effective for the clerks because of the discussions among the clerks. The members of the committee discussed the options and the thought that two or three of the four educational seminars would be designed as “Judges Institute” seminars.

### **1. Review of November presentation (November 27, 2018)**

#### Decedents’ Estates (Moderator - Judge DeGennaro)

Estate Tax Returns (45 minutes) - Presented by Marilee Clark, Esq. of Department of Revenue Services

Closing letters, Calculating fees, Adjustments, Phase out of Succession Tax

Valuing Business Interests (45 minutes to one hour) – Presented by Jim Dougherty, Esq. of Withers Bergman

Insolvent estates (45 minutes) – New forms to review – Presented by Judge Randich

DG matters - Presented by Judge DeGennaro, Judge Wexler (45 minutes)

Custody of Remains – Safe Deposit Box – Estate Examiners

### **2. Review of January Judges Institute (January 17, 2019)**

Title XIX – Eligibility, diversions, exemptions and spend down – Presented by Attorney Lisa Davis. Attorney Davis may provide some additional information on Medicaid (DAS) recovery from estates.

Special Needs Trusts – presented by Attorney Kathleen Tetreault and Attorney Claudia Englesby

Commitments/Probable Cause/Voluntary Admission – Presented by Judge Marino

Guardianships of the Estate – perhaps with UTMA and Trust discussion– Attorney Bennet to check CMS to see which judges may be interested in presenting

### **3. June 2019 Probate Assembly for Judges and Clerks**

Possible topics were discussed:

Ethics – Review the CBA Professionalism seminar and subcommittee –

Guardians of Intellectually Disabled

Miscellaneous Jurisdiction

Since this program, as well as other programs sponsored by the Probate Assembly, will be open to clerks as well as judges, Attorney Brunetti will be joining the committee.

### **4. September 2019 Probate Assembly for Judges and Clerks**

Children's Matters

### **5. November 2019**

CBA-Probate joint seminar

Next meeting to follow the Executive Committee Meeting scheduled for January 9, 2019.

Respectfully submitted,

Michael R. Brandt  
Committee Member