

**MINUTES OF THE NOVEMBER 27, 2017 MEETING  
OF THE PROCEDURES REVIEW COMMITTEE**

**The following were in attendance at the meeting:** Hon. Jennifer Berkenstock, Chair; Hon. Diane Blick; Hon. Peter Barrett; Gale Pellegren, *Chief Clerk Torrington Area Probate Court*; Bonnie Bennet, *Probate Administration Legal Counsel*; Heather Dostaler, *Probate Administration Staff Attorney*; Alison Green, *Probate Administration Staff Assistant*; Dana Masullo, *Probate Administration IT Department*

**The following were absent from the meeting:** Hon. Chuck Norris; Hon. Daniel O'Grady; Hon. Robert Randich; Hon. Philip Wright; Susan Meagher, Chief Clerk, Berlin Probate Court; Lori Michalak, Chief Clerk Shelton Probate Court

**Call to order:** The meeting was called to order at 9:05 a.m.

**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.

**Adjournment:** Upon motion duly made and seconded, the meeting was adjourned at 11:20 a.m.

Respectfully submitted,

*Diane S. Blick*

Hon. Diane S. Blick, Secretary

**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON  
MONDAY, JANUARY 29, 2018 at 9:00 a.m.  
IN THE LIBRARY AT PROBATE ADMINISTRATION**

FORMS FOR CONSIDERATION 11-27-17

PC #	P/C	Form Name	CMS	CMS Case Type	WEB	Suggested Change(s)/Action Taken	Date of Committee Review	Committee Action
236 A-E		Streamline Notices A-E	X			Simplify the streamline notice forms and add clerk's signature	11/27/17	Approved 11/27/2017
267 and Various	P	Decrees that include option of streamline notice procedure; Ex. PC-267	X			Change the decrees that allow for streamline notice from "all persons interested in the proceedings have "received" notice of the right to a hearing. <b>FORMS are: PC-260, 261, 266, 266A, 267, 360, 460, 461, 461A,462A, 463, 2618 and 9609 --</b>	11/27/17	Approved 11/27/2017
411	P	Order and Agreement / Restriction on Control of Assets			X	Add language requiring bank and fiduciary to submit a Verification re Restricted Account on request and in accordance with PC Rule 35.7; Make more clear that account number is required	11/27/17	Approved 11/27/2017
462	P	Decree/Final Account (non-decedent	X			Add streamline language; add question re: receiving notice of right to hearing vs. sending notice; make affidavit of closing optional	11/27/17	Approved 11/27/2017
462A	P	Decree: Final Financial Report (Non-Decedent)	X			Format changes; make affidavit of closing optional	11/27/17	Approved 11/27/2017
500	P/C	Petition/Removal of Guardian			X	Add section to list facts in support of the petition for removal	11/27/17	Approved 11/27/2017
503	P	Petition/Appointment of Guardian of Estate of Minor (New Name)			X	New format and name	11/27/17	Approved 11/27/2017
563	P	Decree/Appointment of Guardian of Estate of Minor (NOTE CHANGE OF NAME OF FORM)	X			New name for form; bond and restriction on assets language modified; order of findings and some text changes	11/27/17	Approved 11/27/2017

FORMS FOR CONSIDERATION 11-27-17

506	P/C	Petition/Reinstatement as Guardian			X	Change title; Create new format with instructions; Include instruction that a parent may not petition for reinstatement if permanent guardian was appointed	11/27/17	Approved 11/27/2017
508	P/C	Petition/ Appointment of Guardian of Person where Parents/Legal Guardians Deceased			X	Add question re: designation of guardian in will or other non-testamentary documents under C.G.S. section 45a-596	11/27/17	Approved 11/27/2017
763	P/C	Decree/Review Proceedings/Appointment of Guardian of Person with Intellectual Disability	X			Add management of finances to the authorities of the guardian; also add finding whether accounts are excused	11/27/17	Approved 11/27/2017
763A	P/C	Decree/Review (No Hearing)/ Appointment of Guardian of Person with Intellectual Disability	X			Add management of finances to the authorities of the guardian; also add finding whether accounts are still excused	11/27/17	Approved 11/27/2017
360	P	Decree/Appointment of Conservator	X			Adding more specificity to any existing POA or health care representative	11/27/17	Approved 11/27/2017
3704	P	Acceptance of Appointment and Agreement of Conservator of Estate			X	Add reference to the standards of practice for conservators for July 2018 deployment	11/27/17	Approved 11/27/2017
3705	P	Acceptance of Appointment and Agreement of Conservator of Person			X	Add reference to the standards of practice for conservators for July 2018 deployment	11/27/17	Approved 11/27/2017