

Statistics Committee Meeting Minutes

May 12, 2017
Newington Probate Court
66 Cedar Street
Newington, CT

Meeting convened at 10:15 a.m. by Judge Andre D. Dorval, Chair.

Other members in attendance: Judge Philip A. Wright, Jr., Judge Andrea Truppa (by phone) and Attorney Evan Brunetti.

Members not in attendance: Judge Scott R. Chadwick, Judge Evelyn M. Daly, Judge John A. Keyes, Judge John J. McGrath, Jr., Judge O. James Purnell, III, Ms. Sondra Waterman and Attorney Bonnie Bennet.

Also in attendance: Probate Court Administrator Paul Knierim.

The committee deferred approval of the minutes of the February 10, 2017 and April 13, 2017 meetings to the next meeting due to lack of quorum.

Although lacking a quorum, Judge Dorval and the members present decided to continue the work of assigning tentative weights to activities to be reviewed by the full committee at the June meeting. The committee worked on the various trust case types, and the recommended weights are listed on the attached Tally Rules Document Revised 5-12-17.

The committee recommends that activities in trusts should receive the same weight as previously recommended for parallel activities in decedents' estates, with the following exceptions:

- For trust accounts, the committee recommends continued differentiation in the assigned weight based on the size of the trust. The group recommends reducing the threshold from \$10 million to \$5 million and assigning a weight of 7 to accounts up to \$5 million and 8 for accounts over \$5 million.
- Compel account is assigned 4 (vs. 3 for decedents' estates).
- A new category of "reminder removal" is proposed with a weight of 3. The intent is to distinguish removals on the court's own motion aimed at compelling compliance with filing requirements (which would receive a 3) from more involved removals involving allegations of breach of fiduciary duty, whether initiated by a party or the court on its own motion (which would receive a 6).

The members recommend two changes to the previously recommended weights in decedents' estates:

- Reduce compel account on court's own motion from 4 to 2.
- Restore establish trust as an activity and assign a weight of 6.

The committee deferred discussion of will contests so that Attorney Bennet can participate in the discussion.

At the next meeting, the committee will review the suggested weights assigned to the activities in the decedents' estates and trusts sections of the Tally Rules and begin review of conservatorship activities.

The next meeting will be held on Friday, June 16, 2017 at 10 a.m. at the NEWINGTON PROBATE COURT, 66 CEDAR STREET, NEWINGTON.

Judge Dorval announced that Sondra Waterman submitted her resignation from the committee due to schedule conflicts.

The meeting adjourned at noon.

Submitted by Paul Knierim

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Fee Waivers				
Fee Waiver		Y	.5	2
Decedent Estates				
Decedent Regular Estates				
Action on Probate Bond		Y	5	6
Administration Intestate	Only the first one counts.	Y	3	6
Administrative Closing		Y	0	2
Admit Will	Only the first one counts.	Y	3	6
Admit Will, Administration having been Granted		Y	2	4
Affidavit of Closing with Hearing		Y	0	3
Allowance for Spouse or Family		Y	2	4
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Final Account of Temporary Administrator	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Allowance of Financial Report of Temporary Administrator	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Ancillary Administration		Y	3	6
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	3
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'	Y	2	5
Appointment of Trustee of Missing Person	Inactive in Decedent Regular Estates.	Y	2	N/A
Approval of Affidavit in Lieu of Administration to Settle Estate	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Approval of Fees	This activity will not count if petition is heard in conjunction with an accounting, financial report or CO-17.	Y	2	4
Approval of Mutual Distribution Agreement		Y	2	4
Approval of Statement of No Assets to Settle Estate		Y	4	3
Articulation		Y	0	2
Ascertainment of Heirs	The activity will not count if it is heard in conjunction with petition on Administration, Probate of Will or account/financial report.	Y	2	4
Certificate Releasing Liens	Only if no estate tax return filed	Y	0	2
Claim by Fiduciary		Y	3	5
Closure for Dormancy		Y	0	2
Compel Account by Party		Y	2	3

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Compel Account on Court's Own Motion	Inactive.	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Compromise of Claim		Y	3	6
Construe Will		Y	3	6
Contempt	Civil contempt only	Y	2	6
CT-706 NT	Only the first return counts.	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	Only the first return counts.	N	1	3
CT-706/709 Amendment (New)				1
Cy Pres		Y	3	6
Determination of Claims Presented to Prior Fiduciary		Y	1	4
Determination of Domicile on DRS Motion		Y	3	6
Disclaimer by Fiduciary on behalf of the Estate		Y	1	3
Disclosure of Estate/Succession Tax Return		Y	3	5
Disclosure of Medical Information		Y	3	6
Discovery Motion	Does not count in Will Contests.	Y	2	4
Distribute Exempt Property to Spouse (Insolvent Estate)		Y	1	3
Establish Trust	Appointment of Testamentary Trustee is under case type TT.	Y	3	6
Excuse Account of Temporary Administrator	Additional accounts/financial reports for the same time period are excluded.	Y	3	4
Extend Claims Period		Y	2	4
Extension of Time For Filing Form CT-706 NT		N	0	1
Final Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Hearing Management Conference		Y	3	6
Hearing on Disallowed Claim		Y	3	7
Inoperative Trust		Y	0	2
Insolvent Estate with claims procedure		Y	3	7
Insolvent Estate without claims procedure (New)				4
Insolvent Estate Hearing on Fiduciary Report		Y	3	2
Interim Account	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded.	Y	4	8
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Objection to Inventory	This activity will not count if it is heard in conjunction with a final financial report or final account.	Y	3	6
Objection to Succession Tax Assessment		Y	3	6
Order for Examination of Estate by Surety or Other Person		Y	2	4
Partial Distribution without Account		Y	3	5
Partition/Sale of Undivided Interest		Y	3	6
Permission to List Real Estate	Approval of Action by Fiduciary	Y	0	
Presumption of Death	Not separate motion – part of petition for administration	Y	1	
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reformation of Will		Y	3	6
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6
Re-Open Estate for Appointment of Successor Fiduciary	See Appointment of Successor Fiduciary	Y	1	
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Revoke Decree Admitting Will and Admit Later Will		Y	2	4
S-1	Only the first return counts.	N	1	3
S-2	Only the first return counts.	N	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if it heard in conjunction with the appointment of the fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Temporary Administration		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Will Contest	Points given for Discovery Motion and Hearing Management Conference; is separate activity still needed?	Y	5	TABLED
Decedent Estate Affidavit and TPO				

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Affidavit Estate	The first Affidavit Estate counts as 2. Supplemental Estate Affidavit counts as 1.	Y	2	5
Allowance for Spouse or Family		Y	2	4
Articulation		Y	0	2
Certificate Releasing Liens		Y	0	2
CT-706 NT	Only the first return counts.	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	Only the first return counts.	N	1	3
CT-706/709 Amendment (New)				1
Disclosure of Estate/Succession Tax Return		Y	3	5
Extension of Time For Filing Form CT-706 NT		N	0	1
Objection	User must enter subject of objection.	N	0	2
Objection to Succession Tax Assessment		Y	3	6
S-1	Only the first return counts.	N	1	3
S-2	Only the first return counts.	N	1	3
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Supplemental Estate Affidavit		Y	1	2
Unseal File		Y	3	6
Decedent Estates Tax Purposes Only				
Articulation		Y	0	2
Certificate Releasing Liens		Y	0	2
CT-706 NT	Only the first return counts.	N	1	3
CT-706 NT Amendment (New)				1
CT-706/709	Only the first return counts.	N	1	3
CT-706/709 Amendment (New)				1
Extension of Time For Filing Form CT-706 NT		N	0	2
Objection	User must enter subject of objection.	N	0	2
Objection to Succession Tax Assessment		Y	3	6
S-1	Only the first return counts.	N	1	3
S-2	Only the first return counts.	N	1	3
Status Conference	User must enter subject of conference.	Y	2	4
TPO Estate		Y	0	0
Decedent Estate 4a-16 Case				
4a-16 Petition		Y	0	2
Status Conference	User must enter subject of conference.	Y	2	4
Decedent Estate Will for Filing Only				
Affidavit and Will are entered as form received.		Y	0	1
Decedent General				
Access to Jointly-Owned Assets in Safe Deposit Box		Y	3	6
Access To Safe Deposit Box to Obtain Will/Cemetery Deed		Y	0	2

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Articulation		Y	0	2
Custody of Remains	Replaces both 'Custody of Remains by Official Designated by Statute with Notice/Hearing' and 'Custody of Remains by Relative or Designated Person with Notice/Hearing'.	Y	1	4
Estate Examiner for Limited Purposes		Y	2	4
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Seal File		Y	3	6
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Unseal File		Y	3	6
Trusts				
Testamentary Trust				
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	3
Appointment of Testamentary Trustee		Y	2	3
Appointment of Trustee of Missing Person		Y	2	4
Appointment of Trustee to Fill Vacancy		Y	1	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces Advice/Approval of Action by Fiduciary	Y	2	5
Approval of Fees	This activity will not count if heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	Inactive.	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Construe Trust		Y	3	7
Contempt		Y	2	6
Cy Pres		Y	3	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Division of Trust		Y	3	7
Enforcement of Pet Trust		Y	3	6
Establish Trust		Y	3	6
Excuse Final Account of Trustee	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 6.	Y	3 or 4	5 or 6
Final Account	Additional accounts/financial reports for the same time period are excluded. f INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	0	
Pro Hac Vice		Y	0	2
Purchase Property	Is this covered by Approve/Instruction re: Action by Fiduciary??	Y	3	5
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reformation of Trust		Y	3	7
Reimburse Probate Fee from Estate		Y	3	2
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6
Removal driven by CMS Reminders (New)				3
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if heard in conjunction with appointment of fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Termination of Charitable Trust		Y	3	6
Termination of Small Trust		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Virtual Representation (New)				2
Trust – CASE TYPE NO LONGER ACTIVE				
Action on Probate Bond		Y	5	
Administrative Closing		Y	0	
Affidavit of Closing with Hearing		Y	0	
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	
Appointment of GAL on Petition of Party		Y	1	
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary'.	Y	1	
Appointment of Trustee of Missing Person		Y	2	
Appointment of Trustee to Fill Vacancy		Y	1	
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'	Y	2	
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	
Articulation		Y	0	
Compel Account by Party		Y	2	
Compel Account on Court's Own Motion	Inactive.	Y	0	
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	
Construe Trust		Y	3	
Contempt		Y	2	
Cy-Pres		Y	3	
Disclaimer by Fiduciary		Y	1	
Disclosure of Medical Information		Y	3	
Discovery Motion		Y	2	
Division of Trust		Y	3	
Enforcement of Pet Trust		Y	3	
Establish Trust		Y	3	
Final Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	
Hearing Management Conference		Y	3	

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 10 million dollars, then the point value will be 4.	Y	3 or 4	
Mediation		Y	0	
Mortgage of Real Estate		Y	3	
News-Media Coverage		Y	3	
Objection	User must enter subject of objection.	N	0	
Order for Examination of Estate by Surety or Other Person		Y	2	
Permission to List Real Estate		Y	0	
Pro Hac Vice		Y	0	
Purchase Property		Y	3	
Reconsider, Modify, Revoke Court Order		Y	3	
Recusal with Hearing		Y	4	
Reformation of Trust		Y	3	
Reimburse Probate Fee from Estate		Y	3	
Release of Certificate of Surety		Y	0	
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	
Removal of Fiduciary		Y	3	
Removal of Fiduciary on Court's Own Motion		Y	3	
Request for Reduction/Release of Bond		Y	0	
Resignation of Fiduciary and Appointment of Successor		Y	1	
Sale of Personal Property		Y	3	
Sale of Real Estate		Y	3	
Seal File		Y	3	
Set Bond	This activity will not count if it heard in conjunction with the appointment of the fiduciary.	Y	1	
Status Conference	User must enter subject of conference.	Y	2	
Stay		Y	3	
Substitution of New Bond		Y	1	
Summon to Appear and Give Testimony		Y	3	
Termination of Charitable Trust		Y	3	
Termination of Small Trust		Y	3	
Try Title		Y	3	

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Unseal File		Y	3	
Trust Living				
Action on Probate Bond		Y	5	6
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Trustee of Missing Person		Y	2	4
Appointment of Trustee to Fill Vacancy		Y	1	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary	Y	2	5
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Compel Account by Party	Is this covered - Same as Compel Account for Inter Vivos Trust ?	Y	2	4
Compel Account for Inter Vivos Trust	Same as Compel Account by Party	Y	3	?
Compel Account on Court's Own Motion	Inactive.	Y	0	2
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Construe Trust		Y	3	7
Contempt		Y	2	6
Cy Pres		Y	3	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Division of Trust		Y	3	7
Enforcement of Pet Trust		Y	3	6
Establish Trust		Y	3	6

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Final Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	0	-
Pro Hac Vice		Y	0	2
Reconsider, Modify, Revoke Court Order		Y	3	6
Recusal with Hearing		Y	4	8
Reformation of Trust		Y	3	7
Reimburse Probate Fee from Estate		Y	3	2
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6
Removal driven by CMS Reminders (New)	Is this needed in Living Trusts?			3
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Sale of Personal Property		Y	3	6

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if heard in conjunction with the appointment of the fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Termination of Charitable Trust		Y	3	6
Termination of Small Trust		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Virtual Representation (New)				2
Trust Other				
Action on Probate Bond		Y	5	6
Administrative Closing		Y	0	2
Affidavit of Closing with Hearing		Y	0	3
Allowance of Account for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Allowance of Financial Report for Resigned or Removed Fiduciary	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Appointment of GAL on Petition of Party		Y	1	2
Appointment of Successor Fiduciary	Replaces 'Appointment of Successor for Deceased Fiduciary' .	Y	1	3
Appointment of Trustee of Missing Person		Y	2	4
Appointment of Trustee to Fill Vacancy		Y	1	4
Approval/Instruction re: Action by Fiduciary	User must enter subject of petition. Replaces 'Advice/Approval of Action by Fiduciary'	Y	2	5
Approval of Fees	This activity will not count if it is heard in conjunction with an account/financial report or CO-17.	Y	2	4
Articulation		Y	0	2
Compel Account by Party		Y	2	4
Compel Account on Court's Own Motion	Inactive.	Y	0	2

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Compel or Prohibit Action by Fiduciary	User must enter subject of petition.	Y	2	4
Construe Trust		Y	3	7
Contempt		Y	2	6
Cy Pres		Y	3	6
Disclaimer by Fiduciary		Y	1	3
Disclosure of Medical Information		Y	3	6
Discovery Motion		Y	2	4
Division of Trust		Y	3	7
Enforcement of Pet Trust		Y	3	6
Establish Trust		Y	3	6
Final Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Final Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 6.	Y	3 or 4	7 or 8
Hearing Management Conference		Y	3	6
Interim Account	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Interim Financial Report	Additional accounts/financial reports for the same time period are excluded. If INCOME DURING PERIOD, PRINCIPAL BALANCE ENDING or MARKET VALUE ENDING is greater than 5 million dollars, then the point value will be 8.	Y	3 or 4	7 or 8
Mediation		Y	0	2
Mortgage of Real Estate		Y	3	6
News Media Coverage		Y	3	7
Objection	User must enter subject of objection.	N	0	2
Order for Examination of Estate by Surety or Other Person		Y	2	4
Permission to List Real Estate		Y	0	-
Pro Hac Vice		Y	0	2
Purchase Property	Is this covered by Approve/Instruction re: Action by Fiduciary??	Y	3	5
Reconsider, Modify, Revoke Court Order		Y	3	6

Tally Rules Document

Type of Activity/Form	Rule	Include in Statistics Y/N	Current Weight	New Weight
Recusal with Hearing		Y	4	8
Reformation of Trust		Y	3	7
Reimburse Probate Fee from Estate		Y	3	2
Release of Certificate of Surety		Y	0	2
Release of Funds	If this activity is ex parte, it is 1 point and the fee is 0.00.	Y	1 or 3	2 or 5
Removal of Fiduciary		Y	3	6
Removal of Fiduciary on Court's Own Motion		Y	3	6
Removal driven by CMS Reminders (New)				3
Request for Reduction/Release of Bond		Y	0	2
Resignation of Fiduciary and Appointment of Successor		Y	1	3
Sale of Personal Property		Y	3	6
Sale of Real Estate		Y	3	6
Seal File		Y	3	6
Set Bond	This activity will not count if it heard in conjunction with the appointment of the fiduciary.	Y	1	2
Status Conference	User must enter subject of conference.	Y	2	4
Stay		Y	3	6
Substitution of New Bond		Y	1	2
Summon to Appear and Give Testimony		Y	3	6
Termination of Charitable Trust		Y	3	6
Termination of Small Trust		Y	3	6
Trust Created by a Non-Domiciliary, 45a-477		Y	3	6
Try Title		Y	3	6
Unseal File		Y	3	6
Virtual Representation (New)				2