



STATE OF CONNECTICUT

OFFICE OF THE
PROBATE COURT ADMINISTRATOR

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**Probate Court Rules of Procedure
Advisory Committee Subcommittee I
Meeting Minutes**

Thursday, May 20, 2021
3:00 p.m.

Office of the Probate Court Administrator
186 Newington Road
West Hartford, CT
and via Webex videoconference

The meeting was convened at 3:04 p.m. by Judge Kathleen N. Maxham, Chair.

Other members in attendance: Judge Steven T. Zelman (retired), Attorneys Mary M. Ackerly, Douglas R. Brown, Caitlin Calder, Heather L. Dostaler and Greta E. Solomon, and Mr. Stephen A. Pedneault, CPA, CFE, CFF, FCPA.

Approval of minutes of April 22, 2021

The subcommittee unanimously approved the minutes of April 22, 2021, meeting.

Discussion of List of Issues

1. **Rule 36.13 (fiduciary accounting: general provisions): Update the list of records required to be maintained by a fiduciary in light of advances in technology in the finance world.** There was a consensus that the list of records should be expanded and refined consistent with advances in technology and moving into the future. There was also consensus that the rule should make clear that the court should consider the totality of the circumstances to determine whether the fiduciary has made good faith efforts to substantially comply with the rule.
2. **Rule 13 (court-appointed guardian ad litem): Add a new section to include defined procedure for consideration and scope of guardian ad litem fees.** There was consensus to add a rule stating that any GAL fees must be reasonable in light of the scope of appointment. In addition, extraordinary fees and/or expenses require prior court approval.

The subcommittee has completed discussion of all issues before it and agreed that Attorney Dostaler will present draft language for rule revisions to present at the next meeting.

Next Meeting

The next meeting will be Thursday, June 24, 2021 at 3:00 to 4:00 p.m.

Adjournment

The meeting was adjourned at 3:58 p.m.