

MINUTES OF THE OCTOBER 5, 2020 MEETING
OF THE PROCEDURES REVIEW COMMITTEE

The following were in attendance at the meeting: Hon. Jennifer Berkenstock, Region #14, Chair; Hon. Diane Blick, Litchfield Hills; Hon. Mark DeGennaro, West Haven; Hon. Kathleen N. Maxham, Fairfield; Susan Meagher, Chief Clerk, Berlin; Karen Parzych, Chief Clerk, Madison-Guilford; and Gale Pellegren, Chief Clerk, Torrington Area; and Heather Dostaler, Alison Green and Dana Masullo of the Office of the Probate Court Administrator.

The following were absent from the meeting: Hon. Robert A. Randich, Newington; Hon. Beverly Streit-Kefalas, Probate Court Administrator; Loreen (Lori) Michalak, Chief Clerk, Shelton.

Call to order: The meeting was held virtually via WEBEX and was called to order at 9:08am.

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 also discussed alternative procedures for contingent beneficiaries when a will has a survival clause.

The Committee will meet next on February 1, 2021, and at this time will be scheduled and conducted virtually.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at approximately 10:36.

Respectfully submitted,
Susan Meagher
Susan Meagher,
Acting Secretary

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**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON  
MONDAY, FEBRUARY 1, 2021 AT 9:00AM  
AND WILL BE HELD VIRTUALLY**

| PC #    | P/C | Form Name                                                                            | CMS | WEB | Suggested Change(s)/Action Taken                                             | Date of Committee Review | Committee Action                            |
|---------|-----|--------------------------------------------------------------------------------------|-----|-----|------------------------------------------------------------------------------|--------------------------|---------------------------------------------|
| PC-212  | P   | Affidavit in Lieu of Probate of Will/Administratoin                                  |     | X   | Add specfic request for reimbursement of funeral expenses                    | 10/5/2020                | Further proposed revisions to be circulated |
| PC-300  | P   | Petition/Involuntary Appointment of Conservator                                      |     | X   | Restructure information requested on form                                    | 10/5/2020                | Approved; 10/5/2020                         |
| PC-301  | P   | Petition/Voluntary Representation by Conservator                                     |     | X   | Restructure information requested on form                                    | 10/5/2020                | Approved; 10/5/2020                         |
| PC-302  | P   | Petition/Appointment of Temporary Conservator                                        |     | X   | Restructure information requested on form                                    | 10/5/2020                | Approved; 10/5/2020                         |
| PC-3013 | P   | Petition to Excuse Account/Title 19 Eligibility; Terminate Conservatorship of Estate |     | X   | Revise instructions; Add request for financial information; Reformat margins | 10/5/2020                | Approved; 10/5/2020                         |
| PC-862  | P/C | Probable Cause Hearing Order                                                         | X   |     | Review and revise                                                            | 8/3/2020; 10/5/20        | Approved; 10/5/2020                         |
| PC-867  | P/C | Order re: Petition for Release from Confinement                                      | X   |     | Review and revise                                                            | 8/3/2020; 10/5/20        | Approved; 10/5/2020                         |