

**MINUTES OF THE MARCH 3, 2021 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; Hon. Robert A. Randich, Newington; Susan Meagher, Chief Clerk Berlin; Loreen (Lori) Michalak, Chief Clerk Shelton; Karen Parzych, Chief Clerk Madison-Guilford; Gale Pellegren, Chief Clerk Torrington Area; and Evan Brunetti, Heather Dostaler, Alison Green and Dana Masullo of the Office of the Probate Court Administrator.

Call to order: The meeting was held virtually via WEBEX and was called to order at approximately 10:40am.

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 will meet next on May 3, 2021, and at this time will be scheduled and conducted virtually.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at approximately 12:35pm.

Respectfully submitted,

Loreen Michalak

Loreen (Lori) Michalak,
Secretary

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**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON  
MONDAY, MAY 3, 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-183  | P   | Appearance of Attorney                                                         |     | X   | Add address for client                                                                                                      | 3/1/2021                 | Approved;<br>3/1/2021                             |
| PC-208  |     | Request/Attachments to Connecticut Estate Tax Return/Permanent Official Record |     | X   | Add language to instructions that form must be filed simultaneously with return; Margins for eFiling                        | 3/1/2021                 | Approved;<br>3/1/2021                             |
| PC-212  | P   | Affidavit in Lieu of Probate of Will/Administration                            |     | X   | Carry over from 10/5/20 to add specific request for reimbursement of funeral expenses; minor edits and technical changes    | 3/1/2021                 | Approved with minor additional edits;<br>3/1/2021 |
| PC-262A | P   | Decree/Affidavit in Lieu of Administration to Settle Full Estate               | X   |     | TITLE Change to "Decree/Affidavit to Settle Full Estate" and text changes consistent with PC-2107 title                     | 3/1/2021                 | Approved;<br>3/1/2021                             |
| PC-264  | P   | Decree/Transfer of Personal Property Without Probate Proceedings               | X   |     | Reformat decree options; Add options relating to release of mortgage and representations; Revise orders                     | 3/1/2021                 | Approved with minor additional edits;<br>3/1/2021 |
| PC-330  | P   | Citation and Return/Appointment of Conservator                                 | X   |     | Revise "above-named person" language in return in case print on 2 pages; Minor edits and technical changes                  | 3/1/2021                 | Approved;<br>3/1/2021                             |
| PC-413B | P   | Order Re: Withdrawal of Funds from Restricted Account                          | X   |     | Add option relating to transfer of funds                                                                                    | 3/1/2021                 | Tabled for next meeting;<br>3/1/2021              |
| PC-572  | P/C | Acceptance of Appointment and Agreement of Guardian of Person of Minor         |     | X   | New form for appointment of non-parent guardian of the person of a minor parallels conservatorships and other guardianships | 3/1/2021                 | Approved;<br>3/1/2021                             |
| PC-700  | P/C | Petition/Guardianship of Person with Intellectual Disability                   |     | X   | Add question regarding respondent's ability to pay court-appointed attorney; Minor edits and technical changes              | 3/1/2021                 | Approved with minor additional edits;<br>3/1/2021 |

| <b>PC #</b> | <b>P/C</b> | <b>Form Name</b>                              | <b>CMS</b> | <b>WEB</b> | <b>Suggested Change(s)/Action Taken</b>                                                                                                                                                         | <b>Date of Committee Review</b> | <b>Committee Action</b>                        |
|-------------|------------|-----------------------------------------------|------------|------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|------------------------------------------------|
| PC-908      | P          | Petition for Custody of Remains of a Decedent |            | X          | TITLE Change to "Petition/Custody of Remains of a Deceased Person's Body"; Add phone number for petitioner; Minor edits and technical changes                                                   | 3/1/2021                        | Approved with minor additional edits; 3/1/2021 |
| PC-960      | P          | Decree/Change of Name                         | X          |            | Reformat decree; Add option for "This order does not change the petitioner's birth name as it appears on the birth certificate."; Add finding regarding persons required to register with DESPP | 3/1/2021                        | Tabled for next meeting; 3/1/2021              |