



STATE OF CONNECTICUT  
OFFICE OF THE  
PROBATE COURT ADMINISTRATOR

186 NEWINGTON ROAD  
WEST HARTFORD, CT 06110

TEL (860) 231-2442  
FAX (860) 231-1055  
ctprobate.gov

BEVERLY K. STREIT  
Probate Court Administrator  
HEATHER L. DOSTALER  
Chief Counsel  
ERIC H. ROTHAUER  
Attorney  
ZACHARY T. KING  
Attorney

**Regular Meeting of the  
Probate Court Rules of Procedure  
Advisory Committee**

**Thursday, July 17, 2025  
3:00 p.m. - 4:30 p.m.**

**Office of the Probate Court Administrator  
186 Newington Road, West Hartford, 06110**

**Minutes**

The meeting was convened at 3:06 p.m.

Members in attendance: Chair Hon. Beverly K. Streit, Probate Court Administrator; Assistant Attorney General Rebekah Burgio; Chief Counsel Heather L. Dostaler; Attorney James I. Dougherty; Attorney Zachary T. King; Attorney Andrew S. Knott; Hon. Kathleen N. Maxham (ret.); Attorney Janie L. McDermott; Attorney Melissa Nixon; Mr. Stephen A. Pedneault, CPA/CFF, CFE; Hon. Robert A. Randich; Attorney Eric H. Rothauser; Hon. Sophia H. Shaikh; and Hon. David C. Shepard.

Members absent: Attorney Molly Ackerly; Hon. Peter C. Barrett; Mr. Ned Bixler; Attorney Douglas R. Brown; Attorney Evan C. Brunetti; Prof. Jeffrey A. Cooper; Attorney Carmine Perri; Attorney Greta E. Solomon; and Hon. Steven M. Zelman (ret.).

**Approval of minutes of June 26, 2025 meeting**

A motion to approve the minutes was made by Hon. Kathleen N. Maxham and seconded by Hon. David C. Shepard. The minutes were approved by all members of the committee present at the meeting without change.

**Review of concepts for revision for the 2026 edition**

The Committee continued to review the proposed concepts for rules presented at the last meeting. The full committee offered feedback on the following topics:

- Regarding adoption of a rule to clarify when a social security number is required for a petition, the committee reached consensus to make no changes to the rule.

- Regarding the proposal to review Rule 21, Probate Mediation, there was consensus to make no changes to the rule.
- Regarding the proposal to make eFiling mandatory under Rule 22.3 for any conservator paid by the Probate Court Administration Fund, there was consensus for draft language to be prepared and reviewed for incorporation in the 2026 revisions.
- Regarding mutual distribution agreements under Rule 30.17 and definition of “party” under Rule 1.1(27), the proposal was tabled for further discussion.
- Regarding adoption of notice of bond/restriction on assets procedure to replace limited fiduciary certificates in Rules 35.2 and 35.7, respectively, there was consensus that draft language should be prepared and reviewed for incorporation in the 2026 revisions.
- Regarding records to be maintained by fiduciary under Rule 36.13, there was consensus that draft language should be prepared and reviewed for incorporation in the 2026 revisions.

### **Next Meeting**

The next meeting will be August 7, 2025 at the Office of the Probate Court Administrator, 186 Newington Road, West Hartford, CT 06110 from 3:00 to 4:30 p.m.

### **Other Business**

No other business was discussed.

### **Adjournment**

A motion to adjourn was made by Hon. Kathleen N. Maxham and seconded by Hon. David C. Shepard. The motion passed unanimously. The meeting was adjourned at 4:21 p.m.