

PROBATE ADVISORY WORKGROUP MEETING

Friday, December 15, 2017 at 9:00 a.m.

Ralph L. Carr Judicial Center
1300 Broadway, Denver, CO 80203
1st Floor, Room 1F

Call-in Information: ShoreTel Conf. Call - Dial (720) 625-5050, enter access code **88888888** followed by # key

AGENDA

I. Call to Order

II. Business

A. Approval of October 26, 2017 Meeting Minutes

III. Legislative Audit Committee Hearing 12/5/17 – Update by Chris or Steven

IV. Ongoing Business - Public Administrators Performance Audit – August 2017

A. Probate Advisory Workgroup Subcommittee

1. Update on Subcommittee Work – Judge Leith

2. Discussion Items and Materials Ready for Full Workgroup Vote (Posted Online)

a. JDF XXX – Public Administrator’s Statement of Accounts (updated since Oct.’s meeting)

b. Guidelines for the Operation of the Public Administrator’s Office (updated since Oct.’s meeting)

c. Revision to CRS 15-12-619(4) and (6), and 15-12-621(6) (same as posted in Oct.)

d. Revision to CRS 15-12-623(2) (new posting)

3. Discussion Item – May Need Additional Time

a. Proposed PA Annual Report (updated since Oct.’s meeting)

b. Discussion Regarding – Time, Labor Intensive, and Costs Associated with:

- Providing a ‘description of each distinct service provided’;
- Separating out PA fees from that of their staff/investigators; and
- Additional costs for those who outsource their billing.

4. New JRM Section – Needing Full Workgroup Vote

a. ESTV – Estate Value Code (new posting)

5. JRM Sections – February Meeting

a. Public Administrator’s Statement

b. Special Administration – Formal and Informal

c. Intestate – Formal and Informal

d. Testate – Formal and Informal

e. ESTV – Estate Value Code

IV. Open Floor for Public Comments

V. Next Meeting - Friday, February 9, 2018 @ 9:00 a.m. – 11:00 a.m. in Room 1B, Ralph L. Carr Judicial Center