



JUDICIAL COUNCIL OF CALIFORNIA

PROBATE AND MENTAL HEALTH
ADVISORY COMMITTEE

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PROBATE AND MENTAL HEALTH ADVISORY COMMITTEE

CLOSED MEETING AGENDA

Closed to the Public (Cal. Rules of Court, rule 10.75(c)(3))

Date: November 6, 2015

Time: 9:30 a.m.

Meeting materials will not be posted on the advisory body web page on the California Courts website. Materials are only posted for open meetings. (Cal. Rules of Court, rule 10.75(h).)

I. CLOSED SESSION (CAL. RULES OF COURT, RULE 10.75(C)(3))

The entire meeting will be closed pursuant to California Rules of Court, rule 10.75(c)(3) and 10.75(d). As specified in rule 10.75(c)(3)(E), the Probate and Mental Health Advisory Committee is a “rule committee” and none of the items to be considered in this closed session are budget items, within the meaning of rule 10.75(c)(1). The Chair has not concluded that any of these items may be addressed in open session.

Call to Order and Roll Call

Welcome the committee’s two new members, Hon. James N. Bianco, Judge of the Superior Court, County of Los Angeles; and Ms. Terri L. Daniel, Court Operations Manager, Probate Division, Superior Court, County of San Bernardino; and three members reappointed for new terms, Hon. Cynthia A. Ludvigsen, Judge of the Superior Court, County of San Bernardino; Ms. Sheri Gulino-Vogt, Supervising Probate Examiner, Superior Court, County of Orange; and Ms. Marilyn Reed Kriebel, Principal, Marilyn Kriebel Fiduciary Services, El Cajon.

Item 1 Committee Roster

Review 2015–2016 committee roster and advise of any desired additions or corrections **(Information)**

Item 2 Subcommittee Roster and Selection of Ad Hoc Subcommittees

Review 2015–2016 Legislation Subcommittee roster and select desired ad hoc subcommittees to consider proposals for changes in rules of court and Judicial Council forms to be considered by the committee for Winter 2016 proposals going to the council in April, and Spring 2016 proposals going to the council in October (forms and rules) or December (legislation), 2016) (**Information and Action**)

Item 3 Approval of Minutes

Approve minutes of the committee meeting held on July 17, 2015 (**Action**).

Item 4 2014-2015 Annual Agenda

Review committee’s 2014-2015 Annual Agenda, approved by RUPRO on December 10, 2014 (**Information**).

Item 5 2015-2016 Annual Agenda

Develop committee’s 2015-2016 Annual Agenda (**Action**)

Item 6 Proposal for Development of New or Revised Forms for Implementation of Legislation Creating Adult Guardianships

Discuss creation of revised guardianship petition forms or a new form petition for adult (18years to 21 years of age) guardianships, and a form for a request for extension of existing guardianships beyond 18 years of age; orders; Letters and other ancillary forms, and one or more rules of court, to implement AB 900 (**Information and Action**).

Item 7 Meeting with the Trusts and Estates Section of the State Bar of California (TEXCOM)

Discussion of issues of common interest with five leaders of TEXCOM, Mr. Patrick Kohlmann, Section Chair; Ms. Gina Lera, Section Vice Chair, Co-Chair, Legislation, and Chair, Incapacity Committees; Ms. Yvonne Ascher, Co-Chair, Legislation, and Chair, Ethics Committees; Ms. Vivian Thoreen, Co-Chair, Incapacity Committee; and Mr. Mark Poochigian, Chair, Trusts and Estates Administration Committee.

Item 8 Proposal for Revision of Forms to Implement Changes in Conservatorship Practice Concerning Voting Rights of Conservatees

Proposal of ad hoc subcommittee for modification, effective January 1, 2016, of *Petition for Appointment of Conservator* (form GC-310), *Citation for Conservatorship* (form GC-320), and three optional forms of orders appointing court investigators or setting biennial investigations (forms GC-330, GC-331, and GC-332), to immediately implement changes in voting rights of conservatees made by SB 589 (**Action**).

Item 9 Legislative Report

Report on 2015 judicial-branch budget issues and probate-related legislation by Legislation Subcommittee Chair James Birnberg and Senior Attorney Dan Pone, Office of Governmental Affairs, Judicial Council of California (**Information**).

Item 10 Initial committee review of draft of revised *Handbook for Conservators*

Review of initial draft of revised *Handbook for Conservators* and discussion concerning additional revisions, corrections, and schedule for its completion and distribution (**Information and Action**).

II. ADJOURNMENT

Adjourn Closed Session