

Probate and Mental Health Advisory Committee
Annual Agenda¹—2025–2026
Approved by Rules Committee: October 16, 2025

I. COMMITTEE INFORMATION

Chair:	Hon. Jayne Chong-Soon Lee, Judge, Superior Court of California, County of San Joaquin
Lead Staff:	Corby Sturges, Attorney, Center for Families, Children & the Courts Julia Kaufman, Attorney, Center for Families, Children & the Courts
Advisory Committee’s Charge/Membership: Rule 10.44(a) of the California Rules of Court states the charge of the Probate and Mental Health Advisory Committee, which is to make recommendations to the council for improving the administration of justice in proceedings involving decedents’ estates, trusts, conservatorships, guardianships, and other probate matters, and mental health and developmental disabilities issues. Rule 10.44(b) sets forth additional duties of the advisory committee. Rule 10.44(c) sets forth the membership position of the advisory committee. The Probate and Mental Health Advisory Committee currently has 17 members. The current committee roster is available on the advisory committee’s webpage.	
Subgroups of the Advisory Committee:² 1. Legislation Subcommittee 2. Conservatorship Subcommittee 3. Guardianship Subcommittee 4. Mental Health Subcommittee	

¹ The Annual Agenda outlines the work an advisory body will focus on in the coming year or cycle and identifies areas of collaboration with other advisory bodies and Judicial Council staff resources.

² For the definition of “subcommittee” see Cal. Rules of Court, rule 10.30(c); for “working group,” see rule 10.70; for “workstream,” see rule 10.53(c); and for “education curriculum committee,” see rule 10.50(c)(6).

Advisory Body and Subgroup Meetings Planned for 2025–2026³

- The committee plans to meet remotely once a month. The committee currently meets on the fourth Thursday of every month.
- The Legislation Subcommittee plans to meet remotely once a month from February through August during the 2026 legislative session.
- Additional meetings of the committee and subcommittees will be set as workload dictates.

Notices and agendas of all meetings are posted on the committee’s webpage as required by rule [10.75](#).

☐ Check here if in-person meeting is approved by the internal committee oversight chair.

³ Refer to section IV.2 (Meeting frequency) of the [Operating Standards for Judicial Council Advisory Bodies](#) for governance on in-person meetings.

Note: Because of the current budget and staffing constraints, advisory body chairs and staff must first consider meeting remotely. The chair of the Executive and Planning Committee is extending the suspension of advisory body in-person meetings for the 2025–2026 annual agenda cycle. If an in-person meeting is needed, the responsible Judicial Council office head must seek approval from their advisory body’s internal oversight committee chair. Please see the prioritization memo dated June 23, 2025, for additional details.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key:

Refer to the following key for populating your project priority levels and branch goals. For each Priority Level 1 proposal, the advisory body **must** provide a specific reason why it should be done this year and how it fits within the identified category. If an advisory committee is interested in pursuing any Priority Level 2 proposals, please include justification as to why the proposal should be approved at this time.

Priority Levels for Non-Rules/Forms	
1	Must be done
2	Should be done
Priority Levels for Rules/Forms Proposals	
1a (Legal Compliance)	Proposal urgently needed to conform to or accurately reflect the law.
1b (Council Directive)	Council has directed the committee to consider new or amended rules and forms.
1c (Urgent Remedial Action)	Change is urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public.
1d (Financial/ Legal Risk Mitigation)	Proposal is otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk.
2a (Useful Changes in Law)	Useful, but not necessary, to implement changes in law.
2b (Responsive to Concerns)	Responsive to identified concerns or problems.
2c (Helpful Advancing Branch Goals)	Helpful in otherwise advancing Judicial Council goals and objectives.

Judicial Branch Strategic Plan–Branch Goals	
I.	<u>Access, Fairness, Diversity, and Inclusion</u>
II.	<u>Independence and Accountability</u>
III.	<u>Modernization of Management and Administration</u>
IV.	<u>Quality of Justice and Service to the Public</u>
V.	<u>Education for Branchwide Professional Excellence</u>
VI.	<u>Branchwide Infrastructure for Service Excellence</u>
VII.	<u>Adequate, Stable, and Predictable Funding for a Fully Functioning Branch</u>

#	New or One-Time Projects						
1.	<i>New CARE Act Rules and Forms</i>						<i>Priority: 1a, 1c</i>
<i>Supported Strategic Plan Branch Goals:</i>							
I <i>Access</i> ☒		II <i>Independence</i> ☐		III <i>Modernization</i> ☒		IV <i>Quality</i> ☒	
V <i>Education</i> ☐		VI <i>Infrastructure</i> ☐		VII <i>Funding</i> ☐			
<i>Project Summary:</i> The committee will develop a recommendation for new and amended rules and new and revised forms as needed to implement the Community Assistance, Recovery, and Empowerment (CARE) Act (Welf. & Inst. Code, §§ 5970–5987), as amended by Senate Bill 27 (Umberg; Stats. 2025, ch. 528). The recommendation will also respond to feedback and suggestions from courts and the executive branch. The project is expected to include revisions to the petition forms and the accompanying declaration form as well as the information sheets to conform to changes to the law and to make the forms more user friendly. The committee will also consider developing a recommendation for approval of an optional form for courts to use to refer a person to the CARE process. <i>Status/Timeline:</i> New and amended rules and new and revised forms anticipated to take effect July 1, 2026, January 1, 2027, or both. <i>Fiscal Impact/Staff Resources:</i> Statutory amendments may impose costs and draw on trial court resources, but the rule amendments and form revisions themselves are unlikely to have a significant impact on the courts or the Judicial Council; staff resources include committee staff, Center for Families, Children & the Courts (CFCC), Legal Services, Governmental Affairs, and Editing and Graphics (EGG) staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> <i>Internal/External Stakeholders:</i> trial courts, California Health and Human Services Agency, Department of Health Care Services, county behavioral health agencies, self-represented petitioners, public <i>AC Collaboration:</i> TBD							
2.	<i>One-time revision of forms for petition for appointment of a probate conservator, order appointing a conservator, and letters of conservatorship</i>						<i>Priority: 1a, 1c</i>
<i>Supported Strategic Plan Branch Goals:</i>							
I <i>Access</i> ☒		II <i>Independence</i> ☐		III <i>Modernization</i> ☒		IV <i>Quality</i> ☒	
V <i>Education</i> ☐		VI <i>Infrastructure</i> ☐		VII <i>Funding</i> ☐			

#	New or One-Time Projects								
	Project Summary: The committee will develop a recommendation for revisions to <i>Petition for Appointment of Probate Conservator</i> (form GC-310), <i>Order Appointing Probate Conservator</i> (form GC-340), and <i>Letters of Conservatorship</i> (form GC-350). The recommendation will bring the forms into conformity with the conservatorship statutes, as amended by Assembly Bill 1194 (Stats. 2021, ch. 417) and Assembly Bill 1663 (Stats. 2022, ch. 894), simplify the forms, and reorganize them to make them more user friendly and easier for self-represented petitioners and conservators to understand. The recommendation will include adoption of new separate forms for appointment of a limited conservator and will propose moving some material from the principal petition and order forms to new attachments. The committee will also consider developing an information form to guide petitioners for appointment of a conservator. Status/Timeline: Revised forms anticipated to take effect January 1, 2027. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Trial courts, self-represented litigants, county public guardians and conservators, public AC Collaboration: n/a								
3.	One-time recommendation of revisions to form used to specify a conservator’s duties and for a conservator to acknowledge receipt of required materials Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1a, 1c
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: The committee will develop a recommendation for revisions to <i>Duties of Conservator and Acknowledgment of Receipt of Handbook for Conservators</i> (form GC-348), the form used to implement the requirement in Probate Code section 1834, to conform to changes in the law enacted since 2011, particularly changes enacted by Assembly Bill 1663 (Stats. 2022, ch. 894). Recommended revisions may lead to separation of this form into two separate forms, one to explain the duties and liabilities of a conservator and another for the conservator to file with the court to acknowledge receipt of the required materials. If the committee recommends two separate forms, it will also recommend amending rule 7.1051 to reflect that separation. Status/Timeline: Form or forms anticipated to take effect January 1, 2027.								

#	New or One-Time Projects								
	Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: conservators, conservatees, trial courts, public AC Collaboration: n/a								
4.	New recommendation of revisions to guardianship forms, including form used for nomination of a guardian	Priority: 1a, 1c							
	Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: The committee will develop a recommendation to implement Assembly Bill 495 (Stats. 2025, ch. 664) by revising forms used in the guardianship process. The recommendation will also bring the affected forms into conformity with existing law and improve their usability. The proposal will include revising <i>Consent of Proposed Guardian, Nomination of Guardian, and Consent to Appointment of Guardian and Waiver of Notice</i> (form GC-211) to provide for conditional nomination of a guardian; it may include separating this multipurpose form into several independent forms. If necessary to implement AB 495, the committee will recommend changes to other guardianship forms. Status/Timeline: Revised form or forms anticipated to take effect January 1, 2027. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: families, self-help centers, trial courts, public AC Collaboration: n/a								

#	New or One-Time Projects								
5.	One-time revision of Handbook for Conservators	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Committee staff will continue revising and updating the Judicial Council’s <i>Handbook for Conservators</i> to reflect recent changes to the law, simplify the language, and reorganize the <i>Handbook</i> to make it more user friendly for conservators to access online. The <i>Handbook</i> fulfills the council’s duty under Probate Code section 1835 to develop an information package, make the package available to the courts, and periodically to update the package when changes to the law warrant. (Prob. Code, § 1835(c), (e).) The courts may in turn use the information package to fulfill their duty under Probate Code section 1835(a)–(b) to provide conservators with specified information. The Judicial Council approved the first edition of the <i>Handbook</i> in 1991 to serve as the information package required by section 1835; it was published in 1992. The second edition was published in 2002. The Rules Committee approved work on the third edition of the <i>Handbook</i> in this committee’s 2015 and 2016 annual agendas. The council approved the third edition, effective October 28, 2016. Changes to the law since that edition and a shift to primarily online use require another round of updates to both content and format. The committee will recommend translation of the <i>Handbook</i> into Spanish. Depending on available resources, the committee will also recommend translation into additional languages or promotion of low-cost alternatives to formal translation. Status/Timeline: Committee staff anticipates submitting the revised <i>Handbook</i> to the Judicial Council in late 2025. Fiscal Impact/Staff Resources: No projected fiscal impact to trial courts or Judicial Council; staff resources include committee staff, CFCC staff, Legal Services staff, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, conservators, public AC Collaboration: n/a									
6.	One-time report to the Legislature on court effectiveness in conservatorship cases	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			

#	New or One-Time Projects								
	Project Summary: Probate Code section 1458 (added by Assembly Bill 1194; Stats. 2021, ch. 417, § 4) requires the Judicial Council to “report to the Legislature the findings of a study measuring court effectiveness in conservatorship cases, including the effectiveness of protecting the legal rights and best interests of a conservatee.” The statute requires the report to include specific caseload statistics and to recommend “statewide performance measures to be collected, best practices to protect the legal rights of conservatees, and staffing needs to meet case processing requirements.” Council staff, working with a contractor, have finalized the research tool and are selecting courts for participation. Case file review and focus groups have begun and are anticipated to be completed in 2025. The contractor has also begun to analyze the data and will begin drafting the report soon. The committee will continue to serve as a resource to staff on the recommendations to be included in the report. It will review the final report and recommend council approval and submission to the Legislature. Status/Timeline: Report to the Legislature due January 1, 2027. Fiscal Impact/Staff Resources: Minimal fiscal impact to trial courts; Judicial Council staff has engaged a consultant using funds appropriated for that purpose. Committee staff, CFCC research staff, and the consultant are collaborating on the research that will serve as the basis of the report’s conclusions and recommendations. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: Legislature, trial courts, persons interested in conservatorship proceedings AC Collaboration: n/a								
7.	New recommendation to revise forms used in the fee waiver process in civil actions and proceedings, probate guardianship proceedings, and probate conservatorship proceedings Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 1a
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
	Project Summary: The committee will collaborate with the Civil and Small Claims Advisory Committee to recommend revisions to forms FW-001, FW-001-GC, and FW-001-INFO to implement the exclusion, by Senate Bill 54 (Stats. 2025, ch. 646), of veterans service-connected disability compensation from income used to calculate an applicant’s eligibility for a waiver of court fees under Government Code section 68632(b). The committees will consider recommending additional revisions to these and other forms used in the fee waiver process in response to concerns raised by courts and members of the public.								

#	New or One-Time Projects								
	Status/Timeline: Revised forms are anticipated to take effect January 1, 2027. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, public AC Collaboration: Civil and Small Claims Advisory Committee								
8.	Explore options for promoting recognition and enforcement of tribal court conservatorship orders under the California Conservatorship Jurisdiction Act Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table> Project Summary: The committee will explore options to promote recognition and enforcement of conservatorship orders issued by tribal courts. The options to be considered may include a proposal for Judicial Council–sponsored legislation, a recommendation for education, and a recommendation for revision of the forms used to register conservatorships established by courts of other jurisdictions, including tribal courts, in California under the California Conservatorship Jurisdiction Act (Probate Code, §§ 1980–2033). Status/Timeline: Any proposed legislation, new or amended rules of court, or new or revised forms would circulate for public comment. Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, tribes and tribal courts, conservators and conservatees, public AC Collaboration: Tribal Court–State Court Forum	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐	Priority: 2b
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			

#	New or One-Time Projects								
9.	<i>New recommendation regarding forms used for proof of personal service in decedents' estates, guardianships, conservatorships, and other proceedings under the Probate Code</i>	Priority: 1a							
Supported Strategic Plan Branch Goals: <table border="0" style="width: 100%;"> <tr> <td style="text-align: center;">I <i>Access</i> ☒</td> <td style="text-align: center;">II <i>Independence</i> ☐</td> <td style="text-align: center;">III <i>Modernization</i> ☒</td> <td style="text-align: center;">IV <i>Quality</i> ☒</td> <td style="text-align: center;">V <i>Education</i> ☐</td> <td style="text-align: center;">VI <i>Infrastructure</i> ☐</td> <td style="text-align: center;">VII <i>Funding</i> ☐</td> </tr> </table>			I <i>Access</i> ☒	II <i>Independence</i> ☐	III <i>Modernization</i> ☒	IV <i>Quality</i> ☒	V <i>Education</i> ☐	VI <i>Infrastructure</i> ☐	VII <i>Funding</i> ☐
I <i>Access</i> ☒	II <i>Independence</i> ☐	III <i>Modernization</i> ☒	IV <i>Quality</i> ☒	V <i>Education</i> ☐	VI <i>Infrastructure</i> ☐	VII <i>Funding</i> ☐			
Project Summary: The committee will consider recommending revising or revoking certain proof of service forms or developing an information sheet to implement Assembly Bill 747 (Stats. 2025, ch. 563). This bill, among other things, amended Code of Civil Procedure section 417.10, effective January 1, 2027, to require that proof of personal service of a summons under CCP section 415.10 include one or more photos showing the date, time, and GPS coordinates of the location of each effected or attempted service. Several sections of the Probate Code require personal service to comply with CCP 415.10 and, by implication, the proof of service requirements added by AB 747. Status/Timeline: Circulation for comment planned for spring 2026, with an anticipated effective date of January 1, 2027 Fiscal Impact/Staff Resources: The project is unlikely to have a significant fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, CFCC, Legal Services, and EGG staff. ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.</i> Internal/External Stakeholders: trial courts, self-represented litigants, attorneys, legal service providers, process servers, sheriff's offices AC Collaboration: Civil and Small Claims Advisory Committee, Family and Juvenile Law Advisory Committee									

#	Ongoing Projects and Activities								
1.	Review pending legislation	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: The Legislation Subcommittee reviews pending legislation affecting judicial administration, practice, or procedure in proceedings under the Probate Code, the Lanterman-Petris-Short Act, the CARE Act, and other statutes protecting persons with mental health disorders or developmental disabilities; provides technical assistance to Governmental Affairs office, legislative staff, sponsors, and stakeholders, as appropriate; and recommends positions to the council's Legislation Committee, as required by rule 10.34(a)(3). Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD, depending on subject matter and scope of legislation. AC Collaboration: TBD, depending on subject matter and scope of legislation. In the past, the committee has collaborated with the Civil and Small Claims Advisory Committee, the Collaborative Justice Courts Advisory Committee, the Criminal Law Advisory Committee, the Family and Juvenile Law Advisory Committee, and the Tribal Court–State Court Forum.									
2.	Review enacted legislation	Priority: 1							
Supported Strategic Plan Branch Goals:									
<table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>			I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐			
Project Summary: Review all enacted legislation referred to the committee by the Judicial Council's Governmental Affairs staff to determine whether it raises issues within the advisory committee's purview and, when appropriate, develop recommendations for amendment to the rules of court or revisions to Judicial Council forms to implement the legislation or to bring rules and forms into conformity with it.									

#	Ongoing Projects and Activities								
	Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD; any proposal for new or amended rules of court or new or revised forms would circulate for public comment. AC Collaboration: TBD, depending on subject matter and scope of legislation.								
3.	Update rules and forms to use gender-neutral language	Priority: 2b							
	Supported Strategic Plan Branch Goals: <table><tr><td>I Access ☒</td><td>II Independence ☐</td><td>III Modernization ☒</td><td>IV Quality ☒</td><td>V Education ☐</td><td>VI Infrastructure ☐</td><td>VII Funding ☐</td></tr></table>		I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐		
Project Summary: As rules are amended and forms are revised for independent reasons, the committee will continue to review and, when possible, replace gendered terms or gender identity questions to conform to legislation providing for gender neutrality and nonbinary gender identity. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff, Legal Services staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD; any proposal for new or amended rules of court or new or revised forms would circulate for public comment. AC Collaboration: TBD									
4.	Review suggestions	Priority: 1							

#	Ongoing Projects and Activities						
	Supported Strategic Plan Branch Goals:						
	I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
	Project Summary: As mandated by rule 10.21(c), review suggestions referred by the Chief Counsel from members of the judicial branch and the public for improving judicial administration, practice, and procedure in decedents’ estate, trust, guardianship, conservatorship, and other proceedings under the Probate Code, as well as civil mental health proceedings under the Lanterman-Petris-Short Act and the CARE Act, and recommend action by the council or one of its committees.						
	Status/Timeline: Ongoing						
	Fiscal Impact/Staff Resources: Indeterminate fiscal impact on the trial courts or the Judicial Council; staff resources include committee staff, Governmental Affairs, Legal Services, CFCC, and other staff TBD ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD, depending on subject matter and scope of suggestion AC Collaboration: TBD						
5.	Monitor developments in California guardianship law related to immigrant children					Priority: 1	
	Supported Strategic Plan Branch Goals:						
	I Access ☒	II Independence ☐	III Modernization ☐	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
	Project Summary: Continue to monitor the implementation, in probate guardianship proceedings, of Code of Civil Procedure section 155 (added by Stats. 2014, ch. 685, § 1), Probate Code section 1510.1 (added by Stats. 2015, ch. 694), and other statutes concerning state judicial findings to support (proposed) wards’ federal petitions for Special Immigrant Juvenile classification. If necessary, develop recommendations to amend rules of court or revise forms. Status/Timeline: Ongoing. Any proposal for new or amended rules of court or new or revised forms would circulate for public comment.						

#	Ongoing Projects and Activities													
	Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs, Legal Services, and CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: TBD AC Collaboration: Family and Juvenile Law Advisory Committee; others TBD													
6.	Miscellaneous technical changes to rules and forms						Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☐</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☐	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								
Project Summary: Develop rule and form changes as necessary to make corrections and adjustments meeting the criteria in rule 10.22(d)(2): “a nonsubstantive technical change or correction or a minor substantive change that is unlikely to create controversy....” These include revisions to forms containing dollar amounts that the Judicial Council is mandated to adjust on a regular basis based on statutory criteria. Status/Timeline: Ongoing Fiscal Impact/Staff Resources: Committee staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. Internal/External Stakeholders: n/a AC Collaboration: n/a														
7.	Provide subject-matter expertise						Priority: 1							
Supported Strategic Plan Branch Goals: <table border="0"> <tr> <td>I Access ☒</td> <td>II Independence ☐</td> <td>III Modernization ☒</td> <td>IV Quality ☒</td> <td>V Education ☐</td> <td>VI Infrastructure ☐</td> <td>VII Funding ☐</td> </tr> </table>								I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐
I Access ☒	II Independence ☐	III Modernization ☒	IV Quality ☒	V Education ☐	VI Infrastructure ☐	VII Funding ☐								

#	Ongoing Projects and Activities
	<i>Project Summary:</i> The committee serves as a subject-matter resource for the Judicial Council, its internal committees, other advisory bodies, and Judicial Council staff to support legal work, avoid duplication of efforts, and contribute to the development of recommendations for council action. These efforts may include providing probate and mental health procedural expertise and review to working groups, advisory committees, subcommittees, and Judicial Council staff, as needed. <i>Status/Timeline:</i> Ongoing <i>Fiscal Impact/Staff Resources:</i> Governmental Affairs, Legal Services, Criminal Justice Services, and CFCC staff ☐ Check this box if this project may result in an allocation or distribution of funds to the courts. <i>Internal/External Stakeholders:</i> TBD, depending on the subject matter and scope of the issues raised <i>AC Collaboration:</i> TBD, depending on the subject matter and scope of the issues raised

III. LIST OF 2024–2025 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.	Recommended amended rules of court and new and revised Judicial Council forms—including a revised simplified petition form and a new streamlined alternative petition form for use by licensed behavioral health professionals—to implement amendments to the CARE Act (Senate Bill 42), effective July 1, 2025.
2.	Recommended amended rules of court and revised Judicial Council forms to implement statutory amendments (Senate Bill 1106) to the notice required when a conservator or guardian changes the residence of a conservatee or ward and the notice required when a conservatee dies, effective July 1, 2025.
3.	Recommended revisions to the forms used to succeed to a decedent’s real property in California in response to amendment of the statutes governing that process (Assembly Bill 2016), effective April 28, 2025.
4.	Applied the procedure in Probate Code section 890 to adjust the dollar amounts used to determine the maximum values of different types of property eligible for the summary procedures to succeed to a decedent’s property of “small value” and developed a recommendation to revise the forms used in those summary procedures, except the procedures modified by Assembly Bill 2016, to reflect the adjusted amounts, effective April 28, 2025.
5.	Developed a recommendation to revise two forms used to transfer conservatorships established in other jurisdictions, including tribes, into California under the California Conservatorship Jurisdiction Act (CCJA) to conform the CCJA acceptance procedure to the procedure under California law for appointment of a conservator.
6.	Developed a recommendation to revise two forms used by conservators and approve one form for use by courts to provide statutorily required information to conservatees.
7.	Provided technical assistance on pending legislation, including Senate Bill 27, which amended the CARE Act to obviate the need for Judicial Council–sponsored legislation.
8.	Determined that Assembly Bill 2224 did not require a recommendation for new or amended rules of court of new or revised forms to conform to the bill’s amendments to Code of Civil Procedure section 155.