

Probate and Mental Health Advisory Committee Annual Agenda—2026–2027

Approved by Rules Committee: October 22, 2026

I. COMMITTEE INFORMATION

Chair: Hon. Aaron W. Heisler, Commissioner, Superior Court of California, County of Orange

Lead Staff: Julia Kaufman, Attorney, Center for Families, Children & the Courts

Advisory Body'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 Judicial 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 categories of the advisory committee. The Probate and Mental Health Advisory Committee currently has 17 members. The current committee [roster](#) is available on the committee's webpage.

Subgroups of the Advisory Body:

1. Legislation Subcommittee
2. Conservatorship Subcommittee
3. Guardianship Subcommittee
4. Mental Health Subcommittee

Advisory Body and Subgroup Meetings Planned for 2026–2027:

- The committee plans to meet remotely once a month. The committee currently meets on the fourth Thursday of every month.
 - In-person committee meeting, one time, date to be determined.
 - The Legislative Subcommittee plans to meet remotely once a month from February through August during the 2027 legislative session.
 - Additional meetings of the committee and subcommittees will be set as workload dictates.
- ☐ Check here if more than one in-person meeting is approved by the internal committee oversight chair.

II. COMMITTEE PROJECTS

Priority Levels and Branch Goals Key

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. [Access, Fairness, Diversity, and Inclusion](#)
- II. [Independence and Accountability](#)
- III. [Modernization of Management and Administration](#)
- IV. [Quality of Justice and Service to the Public](#)
- V. [Education for Branchwide Professional Excellence](#)
- VI. [Branchwide Infrastructure for Service Excellence](#)
- VII. [Adequate, Stable, and Predictable Funding for a Fully Functioning Branch](#)

New or One-Time Projects

1. **Project Title:** Revise forms used in decedent's estate proceedings under the Probate Code (new)

Priority: 1a

Supported Strategic Plan Branch Goals:

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 the forms used in decedent's estate proceedings, including, but not limited to, *Petition for Probate* (DE-111) and *Order for Probate* (DE-140), in response to multiple requests and comments from members of the trial courts and the public. These forms have not been updated since 2017 and 1998, respectively. The current form does not contain the option that a will has already been admitted to probate, as allowed by various sections in the Probate Code (see, for example, section 8522). In addition, while the petition form includes allegations regarding a lost will, the order does not comply with the requirements of Probate Code section 8223 and needs to be updated for more explicit compliance with existing law. The recommendation may also revise other forms used in the probate process to correct errors and maintain continuity within the form suite. The recommendation will improve legal accuracy, simplify and reorganize the forms to make them more user-friendly for self-represented litigants, and respond to concerns raised by courts and attorneys.

Status/Timeline: The committee anticipates this to be a two-year project, with an invitation to comment planned for spring of 2028 and with an anticipated effective date of January 1, 2029.

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 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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts, public

AC Collaboration: n/a

2. **Project Title:** Rules and forms to clarify and streamline the procedural requirements for a court-supervised sale of real property by a fiduciary (new)

Priority: 1a

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: The committee will develop a recommendation for new and amended rules of court and new and revised forms to clarify the requirements that apply to a court-supervised sale of real property by a fiduciary, simplify the process for court approval of the sale, and promote statewide uniformity. The proposal is anticipated to include amending existing rules 7.52 and 7.206 and revising existing form DE-260 (*Report of Sale and Petition for Order Confirming Sale of Real Property*) and form DE-265 (*Order Confirming Sale of Real Property*), with other forms used in the process to be revised as necessary. Form DE-265 does not include the option for the finding that the court is vacating the sale (as reported) and ordering a new sale, as required by Probate Code section 10303(c). The recommendation will also respond to concerns raised by judicial officers and attorneys by improving legal accuracy, reducing uncertainty, and creating a more efficient and user-friendly process for self-represented fiduciaries and interested persons.

Status/Timeline: Invitation to comment planned for the spring 2027 cycle, with changes anticipated to take effect January 1, 2028.

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 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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts, public

AC Collaboration: n/a

3. Project Title: Rules and forms to implement legislation updating and clarifying the application of the Indian Child Welfare Act to probate guardianship proceedings (new)

Priority: 1a

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: The committee will collaborate with Tribal Court–State Court Forum to recommend revisions to rules and forms to implement [Assembly Bill 1824](#) (Stats. 2026, ch. 454), which clarifies application of the requirements under the Indian Child Welfare Act in probate guardianship and conservatorship proceedings that could result in the out-of-home placement of an Indian child.

Status/Timeline: Rules and forms are anticipated to circulate in the spring 2027 cycle and to take effect January 1, 2028.

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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts, tribal courts, public

AC Collaboration: Tribal Court–State Court Forum

4. **Project Title:** Amend rules of court to clarify confidentiality of probate conservatorship forms (new)

Priority: 1c

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: The committee will consider amending rules of court to clarify that courts must keep *Confidential Capacity Assessment and Declaration—Probate Conservatorship* (GC-335) and *Everyday Activities Attachment to Confidential Capacity Assessment and Declaration—Probate Conservatorship* (GC-335A) confidential when filed in conservatorship proceedings and to specify whom the court may allow to inspect them to align with Probate Code section 1821(a)(5), which designates portions of the information filed in conservatorship proceedings as confidential and limits distribution of that information. The amendment is intended to protect the privacy of proposed conservatees and current conservatees by clearly notifying courts that this information is confidential.

Status/Timeline: Amended rules are anticipated to circulate for public comment in spring 2027 and take effect January 1, 2028.

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 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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts, persons interested in conservatorship proceedings

AC Collaboration: n/a

5. Project Title: Update guardianship forms, including letters and status-report form, to conform to law and clarify requirements (new)

Priority: 1c

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: The committee will develop a recommendation to revise forms used in the guardianship proceedings to provide additional clarity regarding the use and effect of the forms. The *Letters of Guardianship* (GC-250) do not explicitly state that the named guardian of the person has the care, custody, and control of the ward. The absence from the letters of an express indication that the guardian has care, custody, and control of the ward has led to issues with governments in countries and, perhaps states, bordering California questioning the existence of the custodial relationship, risking separation of the ward from their caregiver and possible criminal proceedings against the duly appointed guardian. This has also led to confusion with our justice partners, such as law enforcement and school districts, in enforcing the terms of custody or providing the necessary services and support. The proposal will include revising GC-250 to indicate that a guardian of the person has care, custody, control, and education rights of the ward and update the language regarding the termination date, as well as other changes as may be suggested. In addition, the proposal will revise *Confidential Guardianship Status Report* (GC-251) to reorganize and simplify the language to make the form more user-friendly and easier for self-represented litigants to complete. Courts receiving the status report have indicated that the filed forms have often been incomplete and do not provide the necessary information for judicial review, requiring an increase in court resources expended to obtain the information that would be provided if the forms were completed properly. The location of the instruction and the advisement on the form has led to courts lacking information necessary for them to perform their duties of ensuring the welfare of the ward and supervising the guardian. Updating the instructions, reorganizing the form, and using more plain-language descriptions will address this issue.

Status/Timeline: Revised forms are anticipated to circulate for public comment in spring 2027 and take effect January 1, 2028.

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 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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts, appointed guardians, persons interested in guardianships

AC Collaboration: n/a

6. Project Title: Clarify permitted use of Judicial Council forms in proceedings under the Probate Code (new)

Priority: 2b

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: The committee will develop a recommendation to amend California Rules of Court, rule 7.104 to bring it into conformity with common practices in probate proceedings and make the process of submitting an amendment to a pleading or a supplement to a pleading more accessible to self-represented litigants. This proposal is being made due to recent updates to forms and the implementation of several new forms that refer to the use of attachments in pleadings. It is anticipated to include amending the rule to more clearly state that specific types of Judicial Council forms, such as attachments or declarations, may be used for these purposes when not otherwise stated.

Status/Timeline: Amended rule is anticipated to circulate for public comment in spring 2027 and take effect January 1, 2028.

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 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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts, public

AC Collaboration: n/a

7. Project Title: Review and make recommendation for submission of report to Legislature on court effectiveness in conservatorship cases (one-time)

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: Probate Code section 1458 (added by [Assembly Bill 1194](#); Stats. 2021, ch. 417, § 4 and amended by [Assembly Bill 1756](#); Stats 2023, ch. 47, §57 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 that serve to protect the legal rights of conservatees, and staffing needs to meet case processing requirements.” Council staff, working with a contractor, have analyzed the data, and prepared a draft report for the committee’s consideration. The committee will review the report before making a recommendation to the Judicial Council for submission of the report to the Legislature.

Status/Timeline: Report to 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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Legislature, trial courts, persons interested in conservatorship proceedings.

AC Collaboration: n/a

8. Project Title: Revise Handbook for Conservators (one-time)

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: The *Handbook* fulfills the Judicial Council’s duties under Probate Code section 1835 to develop an information package, make the package available to the courts, and periodically 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 *Handbook* in 1991 to serve as the information package required by section 1835; the first edition was published in 1992. The second edition was published in 2002, and the third edition was published in 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 of the *Handbook*, including improved accessibility. The committee plans to consider options for improving the *Handbook*’s accessibility, including possible translation of the *Handbook* into Spanish and additional languages or promotion of low-cost alternatives to formal translation.

Status/Timeline: The draft handbook circulated for public comment in September 2026. The committee anticipates presenting the revised handbook to the Judicial Council in December to request approval, effective January 1, 2027.

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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Trial courts, conservators, public

AC Collaboration: n/a

Ongoing Projects and Activities

1. *Project Title:* Review pending legislation

Priority: 1

Supported Strategic Plan Branch Goals:

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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

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. *Project Title:* Review enacted legislation

Priority: 1

Supported Strategic Plan Branch Goals:

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.

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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: TBD

AC Collaboration: TBD; depending on subject matter and scope of legislation.

3. **Project Title:** Miscellaneous technical changes to rules and forms

Priority: 1

Supported Strategic Plan Branch Goals:

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 and updates to form numbers in current forms to reflect recent additions or updates.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Committee staff, CFCC staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: n/a

AC Collaboration: n/a

4. Project Title: Update rules and forms to use gender-neutral language.

Priority: 1

Supported Strategic Plan Branch Goals:

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 gender-specific 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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: TBD, depending on the subject matter of the relevant rules and forms

AC Collaboration: TBD.

5. Project Title: Update Judicial Council form content to enhance accessibility.

Priority: 2a

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: As forms are developed or updated, the committee will continue to enhance accessibility features. Updates may include reordering or replacing items to improve usability and revising forms to clarify instructions, headings, or form field descriptions (i.e. labels).

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. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: Court and court users; all draft proposals will circulate for public comment.

AC Collaboration: As appropriate, depending on the affected forms.

6. **Project Title:** Review suggestions

Priority: 1

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, as appropriate.

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 staff, Legal Services staff, CFCC staff, and other staff TBD.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: TBD, depending on subject matter and scope of suggestion.

AC Collaboration: TBD

7. Project Title: 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, Probate Code section 1510.1, and other statutes and case law concerning state judicial proceedings related to (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.

Fiscal Impact/Staff Resources: Committee staff, Governmental Affairs staff, Legal Services staff, and CFCC staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: TBD

AC Collaboration: Family Law and Juvenile Committee, others TBD

8. Project Title: Provide subject-matter expertise

Priority: 1

Supported Strategic Plan Branch Goals:

I. Access ☒	II. Independence ☐	III. Modernization ☒	IV. Quality ☒	V. Education ☐	VI. Infrastructure ☐	VII. Funding ☐
--	--	---	--	--	--	--

Project Summary: 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.

Status/Timeline: Ongoing

Fiscal Impact/Staff Resources: Governmental Affairs staff, Legal Services staff, Criminal Justice services staff, and CFCC staff.

☐ Check this box if this project may result in an allocation or distribution of funds to the courts. *Advisory body staff will coordinate with Budget Services to ensure its review of relevant materials.*

Internal/External Stakeholders: TBD, depending on subject matter and scope of issues raised.

AC Collaboration: TBD, depending on subject matter and scope of issues raised.

III. LIST OF 2025–2026 PROJECT ACCOMPLISHMENTS

Project Highlights and Achievements

1. Recommended amended rules of court and new and revised Judicial Council forms to implement amendments to the CARE Act (Senate Bill 27; Stats. 2025, ch. 528). The recommendation included revising five forms, approving two forms, amending four rules of court, and repealing one rule of court, effective July 1, 2026.
2. Recommended revisions to three existing conservatorship forms and recommended seven new forms for use to appoint a conservator to conform to changes enacted by Assembly Bill 1663 (Stats. 2022, ch. 894) and to make the forms more user-friendly for self-represented litigants, effective July 1, 2027.
3. Recommended revising the form used to inform conservators of their duties by updating it, dividing it into two separate forms—one form to state and explain the duties and the other form for the conservator to use to file a required acknowledgment of receipt with the court—and amending the rules of court to reflect the change, effective January 1, 2027.
4. Recommended new and revised Judicial Council forms and amendments to rules of court to implement changes to guardianship proceedings as provided in Assembly Bill 495 (Stats. 2025, ch. 664), effective January 1, 2027. The recommendation included amending one rule, adopting one form, approving one form, and revising eight forms to bring them into conformity with the law, update cross-references, and simplify the forms' language and structure so they will be easier to use.
5. Drafted proposed revisions and updates to the Judicial Council's *Handbook for Conservators* and posted a draft for public review and comment, with an anticipated submission of the *Handbook* to the council for consideration in December 2026 and, if approved, an effective January 1, 2027.
6. Collated and reviewed the data collected for the report to the Legislature regarding court effectiveness in conservatorship proceedings as required by Assembly Bill 1194 (Stats. 2021, ch. 417). The committee will continue its work on the report in 2026–2027 to make a recommendation to the Judicial Council for the report's submission to the Legislature by January 1, 2027.
7. Jointly with the Civil and Small Claims Advisory Committee, recommended amending seven rules and revising twenty-two forms used in the fee waiver process to exclude certain compensation as directed by Senate Bill 54 (Stats. 2025, ch. 646), update the forms, correct several misapplications of the law, simplify the forms for use by self-represented litigants, and make additional improvements, effective January 1, 2027.
8. Coordinated with the Civil and Small Claims Advisory Committee and the Family and Juvenile Law Advisory Committee to recommend revisions to proof of service forms to implement the changes enacted by Assembly Bill 747 (Stats. 2025, ch. 563). The recommendation of this committee included adopting two forms, revising three forms, revising and renumbering two forms, and revoking two forms for use in probate proceedings effective January 1, 2027.