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**HB 1062 – Estates and Trusts - Jurisdiction Over Property of Minors or Disabled Persons -  
Authorized Transactions  
House Judiciary Committee  
March 4, 2026  
FAVORABLE**

Good afternoon, Chair Bartlett, Vice Chair Davis, and members of the committee. Thank you for the opportunity to testify in support of House Bill 1062. My name is Sara Westrick, Advocacy Director for AARP Maryland. On behalf of our 850,000 members across the state, I thank Delegates Embry and Taveras for introducing this important legislation.

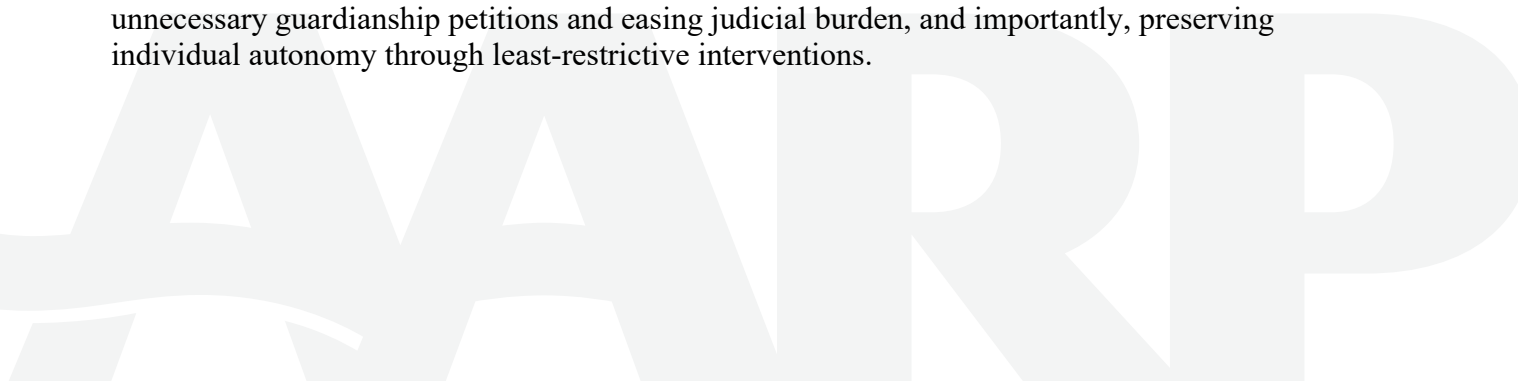
AARP is the largest nonprofit, nonpartisan organization representing the interests of Americans age 50 and older and their families. Key priorities of our organization include helping all Marylanders achieve financial and health security. We seek to empower people to choose how they live as they age, which is why guardianship issues are very important for the organization.

HB 1062 makes a targeted change to the Estates and Trusts Article by expanding the types of transactions a circuit court may authorize without requiring the formal appointment of a guardian. The bill adds two critical types of actions a court may approve. The first is granting access to financial records for a minor or disabled person. The second is establishing eligibility for government assistance programs on their behalf.

These changes align directly with the recommendations of the state's *Working Group on Alternatives to Guardianship for Unrepresented Hospital Patients*, which found that narrowly tailored court authorization is often sufficient to meet a person's needs, without resorting to full guardianship.

While guardianship is essential in certain cases, the Working Group report makes clear that Maryland courts, hospitals, and families face significant delays when guardianship is used for tasks that require only limited and specific authority. In practice, court-appointed guardianship can take weeks or months, with documented waits of 114 to 225 days in some Maryland jurisdictions. These delays often prevent caregivers, providers, and state agencies from accessing the basic financial records needed to apply for Medicaid or other benefits.

HB 1062 will help Maryland families and the broader system by enabling timely access to necessary financial information, facilitating access to essential benefit programs, reducing unnecessary guardianship petitions and easing judicial burden, and importantly, preserving individual autonomy through least-restrictive interventions.



This principle was central to the Working Group's recommendations and is a key policy directive for AARP: guardianship should be a *last* resort. HB 1062 aligns with that framework by empowering courts to authorize specific actions without transferring broad decision-making rights.

### **Conclusion**

HB 1062 fulfills requests from courts and providers for less-restrictive tools, supports families, reduces unnecessary guardianship filings, and strengthens Maryland's commitment to respecting autonomy while ensuring timely access to essential services.

For these reasons, AARP Maryland respectfully urges the Committee to issue a favorable report on HB 1062.

If you have any questions, please contact Sara Westrick, AARP Maryland Advocacy Director, at [swestrick@aarp.org](mailto:swestrick@aarp.org) or by calling 410-310-0374.