

## Chapter 317

**(Senate Bill 164)**

AN ACT concerning

**Estates and Trusts – Interested Person – Definition**

FOR the purpose of altering the definition of “interested person” for purposes of provisions of law governing the estates of decedents, guardians of persons and property, trusts, and powers of attorney; and generally relating to interested persons.

BY repealing and reenacting, without amendments,  
 Article – Estates and Trusts  
 Section 1–101(a)  
 Annotated Code of Maryland  
 (2022 Replacement Volume and 2023 Supplement)

BY repealing and reenacting, with amendments,  
 Article – Estates and Trusts  
 Section 1–101(j)  
 Annotated Code of Maryland  
 (2022 Replacement Volume and 2023 Supplement)

SECTION 1. BE IT ENACTED BY THE GENERAL ASSEMBLY OF MARYLAND,  
 That the Laws of Maryland read as follows:

**Article – Estates and Trusts**

1–101.

(a) In this article the following words have the meanings indicated.

(j) (1) “Interested person” means:

(i) A person named as executor in a will;

(ii) A person serving as personal representative after judicial or administrative probate;

(iii) A legatee in being, [not fully paid,] whether the legatee’s interest is vested or contingent, **EXCEPT THAT A LEGATEE WHOSE INTEREST HAS BEEN FULLY PAID OR FULLY ADEEMED CEASES TO BE AN “INTERESTED PERSON” ON RECEIPT OF PAYMENT OR NOTICE OF THE ADEPTION;**

(iv) An heir even if the decedent dies testate, except that an heir of a testate decedent ceases to be an “interested person” when the register has given notice pursuant to § 2–210 or § 5–403(a) of this article; [or]

(v) An heir or legatee whose interest is contingent solely on whether some other heir or legatee survives the decedent by a stated period if the other heir or legatee has died within that period;

**(VI) A SURVIVING SPOUSE WHO HAS TIMELY FILED AN ELECTION TO TAKE AN ELECTIVE SHARE UNDER § 3–403 OF THIS ARTICLE, EXCEPT THAT THE SURVIVING SPOUSE CEASES TO BE AN “INTERESTED PERSON” ON THE ELECTION BEING WITHDRAWN OR RULED INEFFECTIVE BY A COURT OF COMPETENT JURISDICTION; OR**

**(VII) A PERSON WHO TIMELY FILES A PETITION TO CAVEAT UNDER § 5–207 OF THIS ARTICLE, EXCEPT THAT THE PERSON CEASES TO BE AN “INTERESTED PERSON” ONCE THE CAVEAT PROCEEDING HAS BEEN DISPOSED OF.**

(2) “Interested person” includes:

(i) A minor or other person under a disability; or

(ii) The judicially appointed guardian, committee, conservator or trustee for such person, if any, and if none, then the parent or other person having assumed responsibility for such person.

**(3) “INTERESTED PERSON” DOES NOT INCLUDE AN ASSIGNEE OF A LEGATEE OR AN HEIR.**

SECTION 2. AND BE IT FURTHER ENACTED, That this Act shall take effect October 1, 2024.

**Approved by the Governor, April 25, 2024.**