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March 1, 2023

The Honorable Luke Clippinger, Chair
Judiciary Committee
House Office Building, Room 101
Annapolis, MD 21401

Support (FAV) – HB 760 – Maryland Legal Services Corporation – Affordable Life, Wills, and Estate Planning for Seniors Program

Dear Chair Clippinger and Committee Members:

My name is Alexis Burrell-Rohde. I am the Register of Wills for Baltimore County and testifying in favor of House Bill 760.

I have visited every senior center in Baltimore County providing information about the importance of estate planning and having a will. Despite our best efforts, about two-thirds of people in Baltimore County die “intestate,” meaning without a will. Two-thirds of Baltimore County estates are also small estates, meaning their assets are under \$50,000 for an individual or \$100,000 for a married decedent with all assets passing to the surviving spouse. Thus, the significant majority of intestate estates are of modest value and come from individuals and families of relatively modest means. We need additional estate planning resources to better maintain intergenerational wealth and avoid family conflict.

Each time I speak, I am asked, “how much will it cost to hire an attorney to draft my will?” Presently, the only pro bono estate planning program is through Maryland Legal Aid. This is superb program, but it is only able to serve individuals with adjusted median incomes of 50% or less of Maryland median income. While many Baltimore County seniors are of very limited means, their social security benefits, pension or retirement benefits often place them above 50% of AMI. Therefore, they are unable to qualify for Legal Aid, but they still are unable to afford a private attorney. This group, seniors with modest means, are underserved and would benefit from the greater access to affordable estate planning this program would provide.

Having a well drafted last will and testament is critical for families to build intergenerational wealth and to avoid the bad outcomes that come from self-drafted wills or from dying without a will. Careful planning is particularly important to families with modest means and families of color, who are now the most likely to die without having done any estate planning.

I respectfully recommend a favorable report on House Bill 760 and appreciate the Committee’s thoughtful attention.

Best regards,

Alexis Burrell-Rohde

Alexis Burrell Rohde

Register of Wills for Baltimore County