

Task force to Study Fiduciary Adjudication

Agenda

Link for the webpage for the Task Force – <https://dls.maryland.gov/policy-areas/tf-to-study-fiduciary-adjudication-in-md>

Meeting 1 – Monday, October 20, 6 p.m. (virtual)

- (1) Introductions of Task Force Members:
 - Senate Legislative Members: Chair of the Task Force Senator Nick Charles, Jr. and Senator Chris West
 - House Legislative Members: Delegate Sandy Bartlett and Delegate Aaron Kaufman
 - Conference of Orphan’s Court Judges: Judge Athena Malloy Groves, Associate Judge, Orphan's Court for Prince George’s County and Judge Juliet Fisher, Associate Judge, Orphan's Court for Baltimore County
 - Registers of Wills: Byron Macfarlane, Register of Wills for Howard County, and Mary Rolle, Register of Wills for Frederick County
 - Maryland State Bar Association, Estate and Trust Law Section Council: Jonathan Lasley, esq., and Kelly Preteroti, esq.
 - Expertise in Budget and Personnel Matters: Monica Mitchell, Chief of Staff and Programs Joint Center for Political and Economic Studies
 - Circuit court judge where Circuit Court sits as Orphans Court: Judge Catherine Huger McQueen, Circuit Court for Montgomery County
- (2) Introduction of Staffers for the Task Force:
 - Jo Tetlow and Holly Vandegrift (DLS)
 - Jonathan Lasley and Laura Thomas (MSBA)
- (3) Brief Overview – Format and Guidelines for Task Force Meetings – Chair Charles
- (4) Legislative Intent of Task Force – Kelly Preteroti, esq., from MSBA (substituting for Jonathan Lasley)
- (5) Overview of the 9 Objectives of the Task Force –Chapter 220 of 2025 – Holly
- (6) Background as to the Purpose and Need for the Task Force – Kelly Preteroti, esq.
- (7) Define “fiduciary” for purposes of task force – use definition under § 15–101(g) of the Estates and Trust Article, which is a trustee, guardian of the property, and personal

representative? or expand beyond that definition to include guardian of the person and/or agent under an Advance Directive? – Laura or Jo

(8) Identify Substantive Issues to be Addressed – Kelly Preteroti, esq.

(9) Data/Information Requests – for Maryland Judiciary, other organizations, or departments – Holly

(10) Schedule of Future Meetings – Chair Charles

(11) Closing Remarks