

Task Force to Study Fiduciary Adjudication in Maryland

Senator Nick Charles, Jr., Chair

Agenda

Monday, October 20, 2025

6:00 p.m.

Virtual Meeting via Zoom

<https://dls.maryland.gov/policy-areas/tf-to-study-fiduciary-adjudication-in-md>

I. Introductions of Task Force Members and Staffers

II. Brief Overview

Format and Guidelines for Task Force Meetings

- Senator Nick Charles, Jr., Chair

III. Legislative Intent of Task Force

- Kelly Preteroti, Esq.

IV. Overview of the Nine Objectives of the Task Force

Chapter 220 of 2025

- Holly Vandegrift

V. Background as to the Purpose and Need for Task Force

- Kelly Preteroti, Esq.

VI. Define “Fiduciary” for the Purpose of the Task Force

§ 15-101(g) of the Estates and Trust Article

- Jo Tetlow

VII. Identify Substantive Issues to be Addressed

- Kelly Preteroti, Esq.

VIII. Data and Information Requests

For Maryland Judiciary, Other Organizations, and Departments

- Holly Vandegrift

IX. Schedule of Future Meetings

- Senator Nick Charles, Jr., Chair

X. Concluding Remarks by the Chair

XI. Adjournment