

Task Force to Study Fiduciary Adjudication in Maryland

Senator Nick Charles, Jr., Chair

Agenda

Monday, October 27, 2025

6:00 p.m.

Virtual Meeting via Zoom

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

I. Opening Remarks by Chair

II. Brief Introduction and Overview – Qualifications, Selection, Training of Judges Hearing Probate and Other Fiduciary Matters in Maryland

- Holly Vandegrift, Department of Legislative Services (DLS)
- Jonathan Lasley, Maryland State Bar Association (MSBA)

III. Brief Introduction – Jurisdictional Statutes

- Jo Tetlow (DLS)

IV. Format for this Meeting

- Senator Nick Charles, Jr., Chair

Agenda items V. and VI. below will be discussed by

- Jonathan Lasley, Laura Thomas, Kelly Preterorti (MSBA)
- Byron Macfarlane and Mary Rolle (Registers of Wills)
- Mary Jo Lazun (DLS)
- Each group presenting will have 10 minutes to speak on both Agenda V. and VI. items, with questions and discussion to follow each presentation

V. Examine the Jurisdictions of the Orphans' Courts and Circuit Courts with Respect to Fiduciary Matters

- (1) in orphans' court jurisdictions
- (2) in jurisdictions that require orphans' court judges to be attorneys – Baltimore City and Baltimore and Prince George's counties
- (3) in jurisdictions where the circuit court judges sit as orphans' court judges – Harford, Howard, and Montgomery counties

VI. Comparing the Jurisdictions of Probate Courts in Other States

VII. Concluding Remarks by the Chair