



THE MARYLAND GENERAL ASSEMBLY  
ANNAPOLIS, MARYLAND 21401-1991

## **TASK FORCE TO STUDY FIDUCIARY ADJUDICATION IN MARYLAND**

Senator Nick Charles, Jr.  
Chair

December 8, 2025

The Honorable Governor  
Governor Wes Moore

The Honorable Bill Ferguson  
President of the Senate

The Honorable Dana Stein  
Acting Speaker of the House of Delegates

Re: Chapter 220 of 2025 – Task Force to Study Fiduciary Adjudication in Maryland, Preliminary  
Progress Report and Extension Request Letter

Dear Presiding Officers:

The Task Force to Study Fiduciary Adjudication in Maryland (“Task Force”) is pleased to submit a progress report of the work accomplished during fall of 2025. [Chapter 220 of 2025](#) established the Task Force to examine and analyze the efficiency, uniformity, and quality of fiduciary adjudication in Maryland. As the Task Force started delving into the specific topics outlined in the charge, there was an awareness that more time would be needed to sufficiently examine all of them and to develop concrete recommendations. Over the course of seven meetings, the Task Force has received and considered substantial information regarding the current structures, jurisdictions, procedures, and judicial qualifications of the courts involved in fiduciary adjudication. However, Task Force members have requested additional information, and have not yet had adequate time for the extensive deliberations necessary to make recommendations for improving the efficiency, uniformity, and quality of that adjudication. Accordingly, the Task Force proposes the following:

1. That the Task Force will continue its work until its statutory expiration on June 30, 2026, with its final report being submitted on or before that date.

- a. As they are able, Task Force members will use the period from January 1 through April 16, 2026 to continue to research the topics identified pursuant to Item 2, below, and in furtherance of that research to reach out, as needed, to individuals familiar with fiduciary adjudication in Maryland.
  - b. No later than April 16, 2026, Task Force members shall submit to staff written recommendations for any additional investigation needed into, and any policy proposals addressing, said topics.
  - c. At that time, the Chair of the Task Force shall promulgate a schedule for further meetings, as necessary, to complete the Task Force's work in the time allotted to it.
2. That the Task Force will use its remaining time to develop proposals tailored to achieve, if possible, the following goals:
  - a. Assuring that all judges hearing fiduciary matters be Maryland attorneys in good standing.
  - b. Providing that, in each jurisdiction, a single court – preferably a specialty court or division – will have jurisdiction over all fiduciary matters (probate, trusts, guardianship of the person for adults and minors, and guardianship of the property for adults and minors), and providing for efficient appeals from such court.
    - i. Assuring that such court is adequately staffed by properly vetted and selected judges (including judicial terms and ages of service) and such other staff as shall be deemed necessary.
  - c. Mandating improved education and training for all judges hearing fiduciary matters.
  - d. Addressing such other topics as may be proposed by members and approved by a majority vote of the Task Force.
3. That, in preparing these proposals, the Task Force may avail itself of all the resources and authorities granted to it under Chapter 220 of 2025.
4. That, as required by that statute, the Task Force will issue this preliminary progress report and extension request letter memorializing the above resolves and issue its final report on or before the termination of the Task Force June 30, 2026.

The Task Force notes that consensus was reached on the following: (1) "Fiduciary" includes a trustee acting under a deed, will, declaration of trust or other instrument in the nature of a trust or appointed by a court, a receiver, custodian, committee or guardian of the person and/or guardian of the property of a minor or disabled person, executor, administrator, or personal representative, agent appointed under a financial power of attorney or an advance directive; and (2) Use of data about estate activity, including caseload data, specified on page 9 of this report and letter (titled "No. of Estates Requiring Action by the Registers of Wills or by the Orphans' Courts").

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Should you wish to view any of our meetings or review the materials that have been presented to us, all of the materials and meetings are available at this link <https://dls.maryland.gov/policy-areas/tf-to-study-fiduciary-adjudication-in-md>. On behalf of the Task Force, we look forward to continuing our work on this very important matter for Maryland.

Sincerely,

Senator Nick Charles, Jr.  
Chair

Enclosures

cc: Members, Task Force to Study Fiduciary Adjudication in Maryland  
Victoria L. Gruber  
Ryan Bishop

**General Assembly of Maryland  
Task Force to Study Fiduciary Adjudication in Maryland  
2025 Interim  
Membership Roster**

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**Senator Nick Charles, Jr., Chair**

Senator Chris West

Delegate Sandy J. Bartlett  
Delegate Aaron Kaufman

**Nonlegislative Members**

Judge Juliet G. Fisher  
Judge Athena Malloy Groves  
Jonathan G. Lasley, Esq.  
Byron E. Macfarlane, Register of Wills  
Judge Catherine Huger McQueen  
Monica Mitchell  
Kelly M. Preteroti, Esq.  
Mary C. Rolle, Register of Wills

**Staff**

Joanne Tetlow, Department of Legislative Services  
Holly Vandegrift, Department of Legislative Services  
Laura Thomas, Esq., Maryland State Bar Association  
Jonathan G. Lasley, Esq., Maryland State Bar Association

## **Task Force to Study Fiduciary Adjudication in Maryland**

Pursuant to Chapter 220 of 2025, the Task Force is charged with:

- (1) Examining the qualifications, training, and methods of selection of judges hearing probate and other fiduciary matters in Maryland;
- (2) Examining the jurisdictions of the orphans' courts and circuit courts with respect to fiduciary matters;
- (3) Analyzing the efficiency of the procedures for adjudicating contested and uncontested matters in the orphans' courts and circuit courts;
- (4) Analyzing the effect of the different qualifications of orphans' court judges and related litigation procedures on the uniform application of justice in Maryland;
- (5) Analyzing and compare the laws and practices of other states relating to the adjudication of fiduciary matters, including the selection, qualification, and training of judges hearing those matters;
- (6) Seeking guidance from appropriate witnesses with experience or expertise in the area of fiduciary adjudication;
- (7) Examining any other research, analysis, or guidance related to the best practices for adjudicating fiduciary matters;
- (8) Offering one or more opportunities for members of the public and other interested parties to give their opinions on the subjects considered by the Task Force; and
- (9) Making recommendations to improve efficiency, uniformity, and quality of fiduciary adjudication in Maryland.

**Task Force to Study Fiduciary Adjudication in Maryland**  
***Senator Nick Charles, Jr., Chair***

**SCHEDULE**

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Agendas and meeting materials are available at this link  
<https://dls.maryland.gov/policy-areas/tf-to-study-fiduciary-adjudication-in-md>

**Meetings**

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October 20, 2025	<ul style="list-style-type: none"><li>• Introductions of Task Force Members and Staffers</li><li>• Legislative Intent of Task Force</li><li>• Overview of the Nine Objectives of the Task Force</li><li>• Background as to the Purpose and Need for Task Force</li><li>• Define “Fiduciary” for the Purpose of the Task Force</li><li>• Identify Substantive Issues to be Addressed</li><li>• Data and Information Requests</li></ul>
October 27, 2025	<ul style="list-style-type: none"><li>• Brief Introduction and Overview</li><li>• Qualifications, Selection, Training of Judges Hearing Probate and Other Fiduciary Matters in Maryland</li><li>• Brief Introduction – Jurisdictional Statutes</li><li>• Examine the Jurisdictions of the Orphans’ Courts and Circuit Courts with Respect to Fiduciary Matters</li><li>• Comparing the Jurisdictions of Probate Courts in Other States</li></ul>
November 3, 2025	<ul style="list-style-type: none"><li>• Comparing the Jurisdictions of Probate Courts in Other States – Continuation of Last Monday’s Discussion</li><li>• Analyze the Efficiency of the Procedures for Adjudicating Fiduciary Contested and Uncontested Matters in the Orphans’ Courts and Circuit Courts</li><li>• Appeals from the Orphans’ Courts to Circuit Courts</li></ul>

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November 10, 2025	<ul style="list-style-type: none"><li>• Discussion Continued from Last Monday's Meeting – Workload/Caseload Data – Orphans' Courts and Register of Wills</li><li>• Examining the Qualifications, Selection, and Training of Judges Hearing Probate and Other Fiduciary Matters in Maryland</li></ul>
November 17, 2025	<ul style="list-style-type: none"><li>• Questions and Discussion – Circuit Court Judges That Sit as Orphans' Court Judges in Harford, Howard, and Montgomery Counties</li><li>• Questions and Discussion with Orphans' Court Lay Judge from Charles and Wicomico Counties</li><li>• Continued from Last Monday's Meeting – Workload Orphans' Courts</li><li>• Continued from Last Monday's Meeting – Duties and Workload Registers of Wills</li></ul>
November 24, 2025	<ul style="list-style-type: none"><li>• Definition of "Cases" for Purposes of the Report and Recommendations</li><li>• Maryland Judiciary Data</li><li>• Continued from Last Monday's Meeting – Duties and Workload Registers of Wills</li><li>• Continued from Last Monday's Meeting – Workload Orphans' Courts</li><li>• Proposals and Possible Recommendations – Working Document</li><li>• Analyze the Preliminary Fiscal Information of Fiduciary Adjudication Scenarios Related to "Structural" Changes in the Current Court System</li></ul>
December 1, 2025	<ul style="list-style-type: none"><li>• Public Hearing</li><li>• Continued from last Monday's meeting – Preliminary Fiscal Information of Fiduciary Adjudication Scenarios Related to "Structural" Changes in the Current Court System</li><li>• Analyze the Effect of the Different Qualifications of Orphans' Court Judges and Related Litigation Procedures on the Uniform Application of Justice in Maryland</li></ul>

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- Vote Preliminary Report and Proposed Recommendations
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### No. of Estates Requiring Action by the Registers of Wills or by the Orphans' Courts

Breakdown of Estate Activity - Requiring Action by Register or by Court					
Jurisdiction	No. Estates w/ Activity of Any Kind	No. Estates Requiring Action by ROW Only	No. Estates Requiring Action by Court	% Estates Requiring Action by ROW Only	% Estates Requiring Action by Court
Allegany	13,794	13,304	490	96.45%	3.55%
Anne Arundel	13,304	10,785	2,519	81.07%	18.93%
Baltimore City	12,310	7,500	4,810	60.93%	39.07%
Baltimore	13,105	8,042	5,063	61.37%	38.63%
Calvert	1,605	1,229	376	76.57%	23.43%
Caroline	546	375	171	68.68%	31.32%
Carroll	2,758	1,847	911	66.97%	33.03%
Cecil	1,256	716	540	57.01%	42.99%
Charles	2,170	1,428	742	65.81%	34.19%
Dorchester	535	360	175	67.29%	32.71%
Frederick	3,158	2,281	877	72.23%	27.77%
Garrett	598	251	347	41.97%	58.03%
Harford	5,376	4,302	1,074	80.02%	19.98%
Howard	2,970	2,380	590	80.13%	19.87%
Kent	449	348	101	77.51%	22.49%
Montgomery	10,903	7,436	3,467	68.20%	31.80%
Prince George's	10,128	5,658	4,470	55.86%	44.14%
Queen Anne's	793	555	238	69.99%	30.01%
Somerset	456	375	81	82.24%	17.76%
St. Mary's	1,607	1,080	527	67.21%	32.79%
Talbot	835	631	204	75.57%	24.43%
Washington	2,542	1,861	681	73.21%	26.79%
Wicomico	1,561	1,193	368	76.43%	23.57%
Worcester	1,255	856	399	68.21%	31.79%
Totals	104,014	74,793	29,221	71.91%	28.09%