

**JULY 15, 2020 MINUTES OF THE RESOURCE DEVELOPMENT SUB-COMMITTEE MEETING OF THE
MARYLAND ATTORNEY GENERAL COVID-19 RECOVERY TASK FORCE
LIFE & HEALTH PLANNING COMMITTEE**

Attending: Paul Ballard, Danielle Cruttenden, Ronald Landsman, Sharon Goldsmith, Jordanna Guzman, Jen Yeagle and Shelby McCloskey

There were no objections to the approval of the July 8, 2020 meeting minutes.

There was no agenda for today's meeting. The group decided to focus the meeting discussion on the development of materials: (1) the Resource Directory and (2) a Handbook/Guide that provides information on estate planning documents.

The status of the Resource Directory as discussed. Sharon Goldsmith reported that the program details of one or two other legal services organizations needs to be completed. The goal is to complete the draft of the Resource Directory for review by this sub-committee so that it may then be presented to the Life & Health Planning Committee for their review and approval. Sharon asked how the Resource Directory will be published. Danielle advised that the plan would be for digital publication first with the Communications Committee of the Task Force assisting in that need.

The sub-committee agreed that the Estate Planning Handbook/Guide describing the different forms and documents that should be developed. Ideally, it would be somewhat short in length and should be written to in terms that the general public will understand. It would contain links to other resources for that provide additional information – for example, it should have a link to the Resource Directory and could have links to the People's Law Library and the Register of Wills website. (Offering the handbook in different languages would also be important.) The sub-committee agreed that the following forms and documents need to be addressed in the handbook and divided up the labor of drafting as follows:

- Maryland Advance Directive & MOLST forms – Paul Ballard
- Powers of Attorney – Ron Landsman
- Representative Payee – Ron Landsman
- Standby Guardian – Jen Yeagle
- Wills (including explanation about probate vs. non-probate) – Jordanna Guzman
- Life Estate Deeds – Danielle Cruttenden

An introduction needs to be written that will help all communities understand the value of possessing these documents. Jordanna reminded us that we will need to include a disclaimer to remind readers to seek legal counsel. This would be a good place to insert a link to the Resource Directory.

Shelby agreed to assist with starting a skeleton outline for the group to work with by adding a tab to the L&H Planning Committee's google doc in order for the outline to be reviewed in time for discussion at the next meeting.