



## *Maryland Attorney General's* **COVID-19 Access to Justice Task Force**

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### **JULY 29, 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, Karen Pope-Onwukwe Jordanna, Guzman, Jen Yeagle, Morris Klein, Justin DeVault, Tim Chance and Shelby McCloskey

There were no minutes of the July 22 meeting to review or approve as that meeting was a working meeting of the sub-committee, focused on the development of the handbook.

The agenda was approved. The group continued its focus on the review of the draft resource materials: (1) the Resource Directory and (2) a Handbook/Guide that provides information on estate planning documents.

Sharon Goldsmith was not able to attend the meeting but circulated the most recent draft of the resource directory ahead of the meeting. It was recommended that language be added to the description of the directory to state include probate services. Danielle said she would communicate this to Sharon. Paul noticed that the word "Advanced" should be changed to "Advance" when referring to Advance Directives.

Tim Chance agreed to draft an introduction for the handbook.

In reviewing the draft Handbook/Guide, the following recommendations and comments were made:

- The section on power of attorney should address the differences between a springing and non-springing power; the requirement to notify third parties of the existence of the power of attorney and the potential for financial abuse by the agent.
- Some think the document is too wordy and suggested a one-page head or summary sheet. The group discussed how the guidebook might be arranged digitally to allow subject matters with pull down links to more detailed information. The idea of a post card was also raised.
- The full name of the MOLST form should be spelled out and it should describe in what context you see the form used. (Should it be mentioned that it becomes part of one's medical record?)
- Concern about whether the document gets too much in the weeds in the area of the power of attorney and how we arrive at the right balance of raising awareness of potential pitfalls.
- There should be a link to the statutory form powers of attorney.
- Life Estate Deeds – should be a discussion of pros and cons of adding children on deeds. There should be a more general description of this issue and strong recommendation that the deed be drafted by an attorney

Karen Pope-Onwukwe mentioned that she was doing a presentation to the University of Maryland Alumni for Black Fraternities and Sororities. Paul suggested that an invitation to these organizations to a focus group that the Community Outreach Sub-Committee is looking to form may be beneficial.

The members of the group agreed to review the draft of the handbook in more detail and to direct feedback to the individual authors of the respective parts as needed.

The next meeting was scheduled for August 5, 2020 at 11 am. An invitation will be sent out by Shelby.