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So busy with the kids' activities and work that I have had little opportunity to observe what is going on in my own backyard. Our twin girls recently became teenagers, which coincided with their ever increasing schedule of activities. Fortunately, for my wife, Becky, and I, these activities

have been mostly sports related. As if the hours of homework were not enough, the girls have found their ways onto swimming and volleyball teams and seem always to be in the midst of practice or a weekend long meet or tournament depending on which sport we're talking about. It's not a swirl of activity, it's more like a hurricane. When you live with the storm, there is no practical way to avoid the impact and we are all swept up into it. None of this would be so bad if it were not for the fact that we must drive them everywhere they need to go.

Given all the activity, I could be excused from neglecting the garden. It was, however, a bout with the flu that provided me with a chance to walk around the house and see what was going on at ground level. I say walk, but it was more of a stumble. My head was pounding with each step and every square inch of my body had adopted its own special version of hurt. But the sun was out, I was not lying sleepless in bed, my coughing had lessened in severity, and there was reason to believe I would survive after all. It had only been a day earlier that I was questioning my fate, but now the warm sun was causing me to be momentarily optimistic.

In any event, a mid-March walk around the house and garden reveals the losses sustained over the winter and the potential for spring and summer. I am not much of a gardener, but I enjoy adding to our perennials, planting the annuals, and keeping a neat lawn and herb garden. We don't have much room and not enough sun for tomatoes, but we do our best and the deer are always so pleased with our work that they and their groundhog friends eat most

everything we plant before any of it can mature. In fact, the whistle pigs (another name for groundhog) will even climb the stairs of our deck and squeeze through a gate to reach potted plants on the upper level. My willingness to engage in gardening futility doubtless stems from experience gained early in life.

It was on a late spring visit to a local orchard that my father was apparently struck with the idea that his children, or at least the two oldest boys, would benefit from learning more about the virtues of manual labor. I can remember my great disbelief as my father simply went up to the owner and asked, "was there any work around here that these two boys could do". Neither wage nor child labor laws were mentioned, nor was any caution uttered about potentially hazardous farm machinery. In fact, I was ten and my brother Bruce was nine and we were given a hefty starting wage of fifty cents per hour. We were also soon to learn that our primary protection against injury would be the exercise of common sense, which at our age was essentially a sense of trepidation. To this day, I have no idea what motivated my father to seek employment for us, although I am certain it was not done as a punishment. My father has always been unconventional and I am positive that he believed the experience would be good for us. Turns out, he was right.

The orchard owner was a wizened leathery old man from Sicily who was referred to by everyone, his wife included, as Mr. Aparo. Mr. Aparo was in his early sixties at the time and he was no more than five foot three inches tall, if that. He never moved or spoke in haste. Instead, he seemed always to be conserving his energy, pacing himself for the next chore, and there was always some great task to accomplish. Mr. Aparo communicated with short bursts of speech accompanied by instructive hand gestures and often only with the gestures. This had nothing to do with his fluency in English. He could speak clearly and intelligently when he felt like it, which was rarely. He was a living, walking, time warp of a man. He was typically outfitted in blue jean overalls, flannel work shirt (regardless of season) and a fedora. Mr. Aparo's "new car" was a 1954 Cadillac that was turquoise and white on the

Continued on page 3

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PRESIDENT'S MESSAGE

Continued from page 1

exterior, all turquoise on the inside with tons of chrome trim. On rainy days, we would clean this car that seldom was seen outside of its designated barn/garage. The everyday driver was an early forties Nash coupe that was black inside and out and looked like it had rolled off the set of an Elliot Ness film.

As a ten year old, I could look Mr. Aparo straight in the eye. Although over the next five years, my brothers and I soon came to tower over our antique boss, it was Mr. Aparo who was most secure in his own physical stature. He would call us skinny and insisted that we should work harder to build up our muscles. Despite his diminutive frame, Mr. Aparo was Popeye strong and tough as nails. He could lift bails of hay like they were boxes of Kleenex. Let's just say he was a very tough guy, probably the toughest guy I ever knew.

I never thought I would grow to appreciate Mr. Aparo or any of the hard work he had us do, but I was wrong. We learned to plant and pick tomatoes, squash, strawberries, apples, peaches, pears and much more. We learned how to clear the fields of rocks in the spring, how to pull the weeds from around the plants in the summer, how to scale the large apple trees in the fall and how to prune the trees in the winter. It was the hardest work I ever did and nothing has ever come close since.

So now, as I look down at the prim roses and daffodils as they pierce their way through the soil, I think back to the orchard. I will do the same surveying my desk upon my return to the office as I wonder how I will find the time and energy to catch up with all the work that was not done while I was out sick. Then I will remind myself how lucky I am to make a living on the basis of my intellect as opposed to how much manual labor I can perform. Yes, we constantly face new and difficult challenges as attorneys, but we have the luxury of being able to overcome these obstacles with intelligence, and our potential is therefore limitless. Spring brings us such optimism.

Respectfully submitted,

John C. Fredrickson
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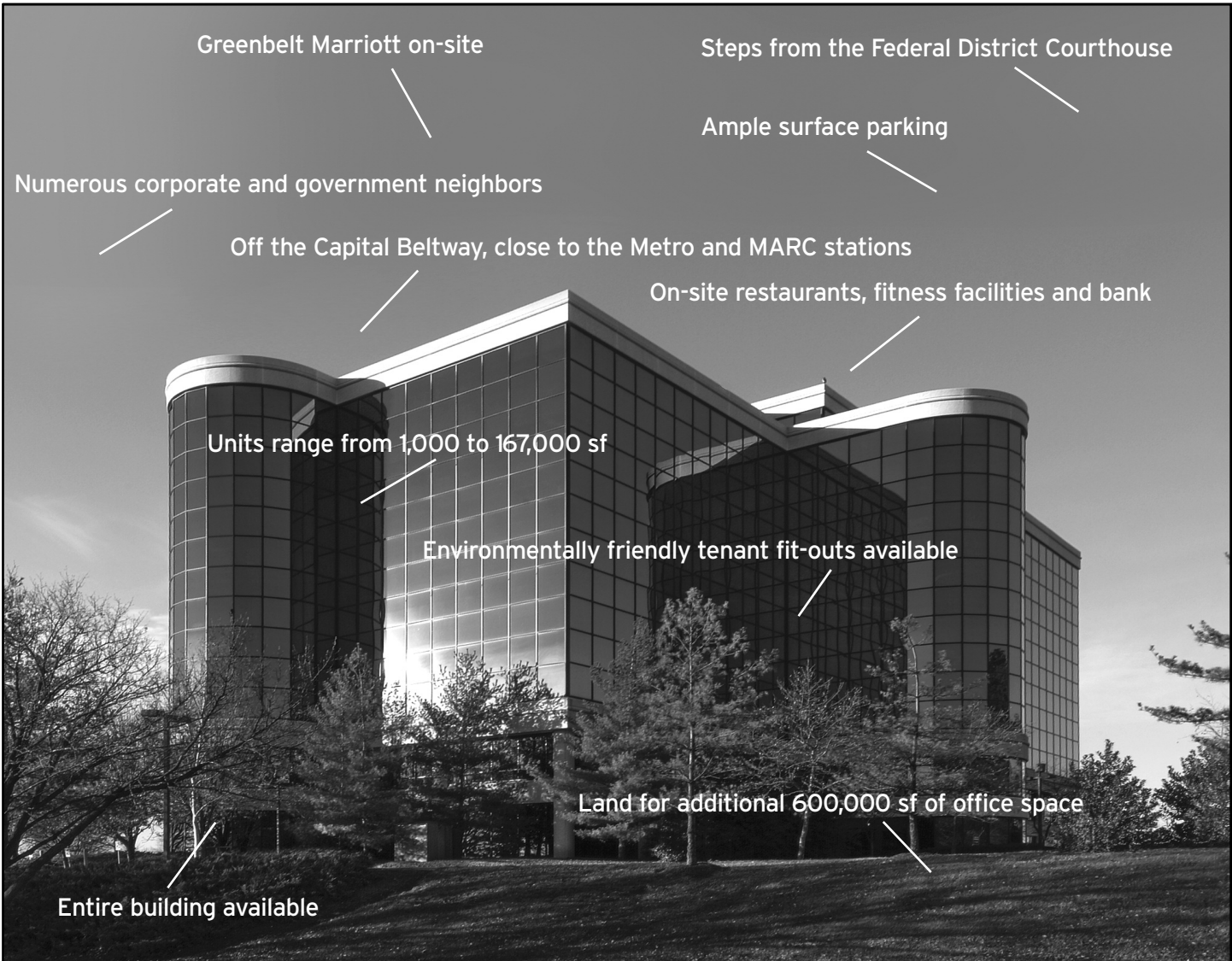
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Prince George's County Faced Twice as Many Home Foreclosures!

In the past year, Prince George's had twice as many home foreclosures as any other county in Maryland, according to data compiled by the firm RealtyTrac Inc., a national foreclosure tracking company. **Tom Perez**, Secretary of the State Department of Labor, Licensing and Regulation and Co-chairman of the Governor's Foreclosure Task Force, stated that "Prince George's County is ground zero in Maryland's foreclosure challenge."

In order to address this challenge, the **Prince George's County Pro Bono Committee** of the Court of Appeals along with other organizations including CASA de Maryland, Civil Justice Center, Community Legal Services of Prince George's County, Inc., Maryland Legal Aid, Pro Bono Resource Center of Maryland sponsored a free workshop for homeowners facing foreclosure to learn about their options and rights. Homeowners met one-on-one with lawyers specially trained by Civil Justice network for free. The event was held on March 15, 2008, at the YMCA in Fort Washington. We extend our gratitude to **Angie Hawkins**, President of the YMCA DC and **Jimmy Rogers**, District Executive Director for donating the space. We also thank CASA de Maryland for providing English/Spanish interpreters for this workshop.

Updates: Foreclosure Workshops and the New Comparability Rule

On April 4, 2008, the **Prince George's County Pro Bono Committee** held a free training for lawyers to assist clients in foreclosure cases as well. The event was held in the offices of Legal Aid Bureau in Riverdale, Maryland. We express our gratitude to **Phil Robinson** from Civil Justice Center for providing the training, to **Blake Fetrow**, Executive Director of the Legal Aid Bureau for donating the space for the training, and to **Manuel Geraldo**, Chair of the Prince George's Pro Bono Committee, for making the issue of home-foreclosures in the County a top priority of the Pro Bono Committee. **Future foreclosure workshops will be scheduled around Prince George's County!** If you would like to be informed on future events, feel free to write me at eidelman@clspgc.org or contact me by telephone at 301-864-4907, ext. 12.

New Comparability Rule!!

Legal services providers including Community Legal Services (CLS) appreciate the changes provided by the Comparability Rule that will help solidify funding for legal services through out Maryland. Most banks have already sign on, and 18 have already joined the new MLSC/MSBA IOLTA Honor Roll. Banks in the Honor Roll Program are those who are paying even higher interest rates on lawyer trust accounts.

The Maryland Court of Appeals recently amended MD Rule 16-610 governing attorney trust accounts to ensure that banks participating

in the IOLTA Program pay interest rates on IOLTA deposits that are comparable to rates paid on similarly situated non-IOLTA accounts. The Rule means more funding for legal services. Virtually all Maryland Financial Institutions will remain approved to accept IOLTA Accounts pursuant to the new Rule, which takes effect April 1, 2008. To find more information on changes to the Rule and participating banks in the Honor Roll program, you can go to Maryland Legal Services website at <http://www.mlsc.org/>

Community Legal Services of Prince George's County, Inc., is a non-profit organization established to provide quality civil legal services to low-income persons in Prince George's County. It does this through the generous contribution of legal advice and legal representation by members of the private Bar. Additionally, CLS operates three free legal Clinics in the County. They are located in the in Circuit Court House, Oxon Hill, and Langley Park respectively. For more information about our services, please contact Nora C. Eidelman, at 301-864-4907, ext. 12.

CLS is Featured in the Catalogue for Philanthropy 2006-07. View our profile at: http://www.catalogueforphilanthropy-dc.org/2007/community_legal_71641.htm

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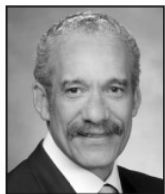


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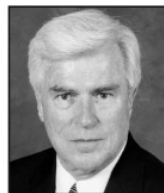
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FALSE BELIEF ALONE IS INSUFFICIENT TO INVALIDATE WILL

By: Timothy P. O'Brien

In *Dougherty v. Rubenstein*, 172 Md.App. 269, 914 A.2d 184 (2007), the Court of Special Appeals was recently called upon to consider whether a will that disinherited the testator's son should be set aside as a result of the testator's false belief. In *Dougherty*, there was no dispute that the testator's will was the product of this false belief. However, there was a dispute as to whether the "false belief" was an "insane delusion."

Issues related to "false beliefs" and "insane delusions" have rarely been addressed by the appellate courts in Maryland. There have only been seven reported cases between 1848 and 2006. However, those issues can arise more often in the practice of law. When representing clients in estate planning matters, attorneys are occasionally directed by clients to prepare wills that "cut out" one or more heirs. In such cases, it is particularly important for the attorney to assess the client's rationale and the client's capacity to make a will. If the client's capacity to make a will is properly assessed, it may make it more difficult for a disinherited heir to show that the false belief of a testator constituted an "insane delusion."

The facts of the *Dougherty* case will sound familiar to many attorneys that have dealt with generational disputes. In late 1997, the testator was hospitalized following a minor stroke. Following his discharge from the hospital in early 1998, the testator's son placed the testator in a boarding home. The testator was angry and adamantly objected to the placement. The testator was miserable at the boarding house and he repeatedly demanded to be taken to his own house to live. After about a week at the boarding house, the testator's sister (without the son's knowledge) removed the testator and returned him to his own home.

While the testator was hospitalized, the son started to handle the testator's financial affairs. Once the testator was back home, the son returned the financial records to the testator. The testator lashed out at his son and falsely accused him of stealing money. To no avail, the son tried to reason with the testator and show him that no money had been taken. The testator persisted in his false belief that his son stole from him. The testator shunned his son and told him, "As far as I'm concerned, you are dead." That was the last time the two saw each other.

In June 1998, the testator executed a will (the "1998 Will") that disinherited the son and left the entire estate to the testator's sisters. At the time the 1998 Will was executed, the testator's attorney observed that the testator appeared to be competent to make a will and that there was no indication of the exertion of undue influence over him.

The testator never reconciled with the son and died in October 2004. The 1998 Will was offered to probate by the testator's sister. The son challenged the 1998 Will on several grounds, including the existence of "insane delusions." After an evidentiary hearing in the Orphans' Court, the judge found that, when testator executed the 1998 Will, the testator "was lucid, he was coherent, he understood the extent of his assets and the object of his bounty, except for the [possible] issue of [an] insane delusion[.]" The judge further found that, although the 1998 Will was a product of a false belief, there was no evidence to show that the "delusion or incorrect belief was the product of a mental disease." The Orphans' Court admitted the 1998 Will to probate. The son appealed.

On appeal, the Court of Special Appeals provided a detailed analysis of Maryland law as it relates to "insane delusions." The Court noted that, under Maryland law, every person is presumed

to be sane and to have the mental capacity to make a valid will. This presumption, however, is rebuttable by proof that the testator was either (a) permanently insane before he made his will or (b) was of unsound mind when he made the will. An "insane delusion" is one variety of unsoundness of mind that could void a will. The Court further noted that:

an "insane delusion" is 'a belief in things impossible, or a belief in things possible, but so improbable under the surrounding circumstances, that no man of sound mind could give them credence.' It also has defined the term to mean 'a false belief for which there is no reasonable foundation ... concerning which [the testator's] mind is not open to permanent correction through argument or evidence.' (Internal citations omitted).

The Court of Special Appeals also explained that eccentricity, peculiar beliefs and hostility toward relatives are not, by themselves, "insane delusions." Nor is an insane delusion a general defect of the mind. Indeed, a person that otherwise appears competent and rational on other subjects could be found to be suffering from an "insane delusion" in regard to a particular person or event. The Court of Special Appeals reviewed three earlier Maryland appellate cases that discussed "insane delusions" and noted the common facts of those cases where "insane delusions" were found to exist:

All were negative false beliefs about the character of a particular close relative of the testator that were not connected to any reality or

Continue on page 11

true experience, existing only in the testator's (or grantor's) mind. Even an illogical thought process or generalization could not link the negative false belief to some true fact about the subject of the delusion. Not only was there no evidence in any of the cases that the subject of the delusion had done whatever it was the testator was convinced he or she had done; there also was no evidence that the subject of the delusion had done anything negative toward the testator (or any one else) that could account, even irrationally, for the testator's wrath. The delusions did not suggest mistake, unreasonableness,

confusion, stubbornness, poor judgment, denial, or willfulness; *they only could be explained by a deranged mind.* (Emphasis Added).

The Court of Special Appeals distinguished the facts in Dougherty from the facts in the earlier appellate cases. The Court noted that in the earlier appellate cases, "there simply was no explanation, whether or not rational, for the testator's sudden false belief, and therefore the delusion only could have come from within the testator's own mind." In Dougherty, the testator's beliefs were based upon his terrible experience at the boarding house that he blamed completely on his son. Though not logical, the testator's delusion that his son also had betrayed him by stealing his money was based

on the testator's stubborn belief that his son had done wrong by placing him in the boarding house. The Court of Special Appeals held that although it was a false belief, and it prompted the testator to disinherit his son, "it was not an inexplicable delusion that only could have come into being as the product of an insane mind."

When a client directs an attorney to draft a will that disinherits an individual who would otherwise be the natural object the client's bounty, the attorney should make inquiries into the reasons for the disinheritance. Even if the reason is based upon a false belief, the will still may be valid if the client can provide an explanation that is based upon external events and not solely on a deranged mind.

MARYLAND LEGAL SERVICES CORPORATION ANNOUNCES GRANT

AWARDS FOR JUDICARE PILOT IN MARYLAND

The Maryland Legal Services Corporation (MLSC) announces funding of our pilot projects to expand representation in family law matters at reduced fees. Grants for January 1 through June 30, 2008 have been awarded to Allegany law Foundation, Community Legal Services of Prince George's County, Harford County Bar Foundation and Maryland Volunteer Lawyers Service.

In early 2007 a study was commissioned by the Maryland State Bar Association (MSBA) Section on Delivery of Legal Services with support from the Administrative Office of the Courts (AOC) to review the potential of reinstating a program from the 1970s known

as "Judicare," which uses private lawyers paid reduced fees to serve low-income persons who could not otherwise obtain civil legal services. University of Maryland School of Law Professor Michael Millemann conducted the study, which was released last May and presented at the annual meeting of the Judiciary in conjunction with the MSBA annual meeting in June.

As recommended in the study, private attorneys accepting Judicare cases in family law matters will be paid \$80 per hour with a cap of \$1,600 for 20 hours of work. Compensation also includes a waiver provision for up to \$800 in additional payments if the attorney works five additional pro bono hours.

MLSC plans to continue the pilot project through Fiscal Year 2009,

and AOC will conduct an evaluation with the anticipation of expanding the project to other jurisdictions.

MLSC was established by the Maryland General Assembly in 1982 to receive and distribute funds to nonprofit organizations that provide civil legal assistance to low-income persons. From its inception, MLSC has made grants totaling over \$108 million to help provide services in more than 1.5 million legal matters for Maryland's families in areas of family, housing, consumer, employment, health care and other civil legal matters.

**BAILIFFS ANNOUNCE STRIKE
DEADLINE**

Judge *Albert W. Northrop-Special Reporter*

The Circuit Court bailiffs announced on **April 1**, that barring resolution, they will go out on strike on April 21, 2008. In a statement released from the bailiff's office generally, it was stated:

"We are at an impasse. What we are asking for is simple and is for no more that our brothers on the District Court already have. Our simple request has fallen on deaf ears. Accordingly, we will go out on strike on **April 21, 2008.**"

At issue is a request for a clothing allowance for uniforms and for the right to carry a firearm.

District Court bailiffs all carry a firearm for courtroom security and all wear a uniform in the form of a blue blazer. The blazer makes them readily identifiable in the courtroom.

Owing to budgetary constraints, the request has been denied.

The proposed uniform would be a scarlet blazer with a matching solid color tie and a charcoal shirt. "This would readily make it clear who the bailiffs are and would produce a nice color contrast to the Circuit judges' blue robes."

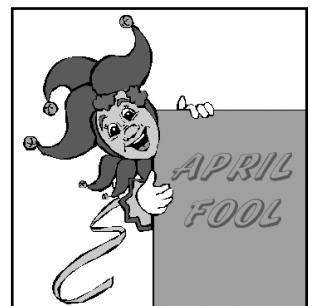
As to the firearm request, it was noted that "...there are civil cases where sheriff's deputies are not

always present. Those people can go crazy too and we need to be able to protect the courtroom. There is nothing like a warm Glock on your hip. And we want .45s, not those little 9mm types." The lone judicial response at the time of this report was from Judge Schiff who favored arming the bailiffs. Said Judge Schiff, "I need all the protection I can get."

In a show of solidarity, the District Court bailiffs announced that they would honor the Circuit Court bailiffs' move by striking as well. In addition, they have asked for new green blazers with matching ties to be worn over lavender shirts.

The total cost to outfit all the bailiffs as requested would be \$8,246.00 plus tax. One suggested resolution has been to explore the possibility of having the bar association fund the requested clothing allowance.

In anticipation of the strike the bar will hold, at the Circuit Court request, a training day for volunteer substitute bailiffs on Sunday, **April 13, 2008 from 8:30 a.m. till 12 noon** in the jury assembly lounge. While participation is voluntary, members of the bar are encouraged to sign up and attend. Those who participate will be given a special commemorative badge to keep as a memento. There's been no word from the bailiffs regarding any proposed picket lines or action against strike breakers.



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Sticking to a Client's Best Interests
When Their "Diminished Capacity" is

Discovered After Establishment of the
Attorney-Client Relationship

By: Benjamin J. Woolery

INITIAL FACTS:

Wouldn't it be nice if client's carried 'Certified Competent' cards with them to their first appointment?

Candace knew her father's life was nearing its end - Dad allowed her and her minor son Andy to live in his home, where she's been caring for him for four years; she was aware of his affairs enough to know that she and one of her sisters are in the Will, while the third and fourth sisters were being disinherited.

Viewed as simply a straightforward Elder Law matter, the daughter and I discussed the asset protection technique whereby a parent can convey their home to a child that's resided in that home for at least the two years immediately preceding the parent's admission to a health care facility if a medical professional can vouch for the idea that the parent would have needed institutional care but for the child's assistance; the parent's care in a nursing home would be paid for by Medical Assistance. I assured the daughter, if her widowed father was otherwise lacking in assets as the Deed described does not violate the Medicaid Law. We reviewed the ideas of "competent" to sign, and "voluntarily" signing it before a disinterested Notary (perhaps reserving a Life Estate), and quoted a fee for her to come back with if her father seemed inclined to alter his estate plan in this manner.

What was looking like a cookie-cutter case was taking a typical turn as the consultation neared its end, that turn being a comment something like "Isn't this case unusual?" (no) or "Isn't my family strange?" (Truly, "normal" families are unusual, at least those that find the need for lawyers) or "My family's going to tell you I'm crazy if you talk to them" (heard often enough

to think nothing of it). In hindsight, I recall Candace offering the last of these - I hardly thought twice about her statement, but I did think about it that second time long enough to look back into her eyes as I escorted her to the office lobby and it registered with me: this wasn't sibling rivalry playing out four decades along, but more of a serious statement by a clear-thinking client. Not suspecting any clinical truth to it, and none being offered to my perception, I assured her that Dad's mental capacity is what matters if a Deed was being prepared. When she called later that day on the cell phone to thank me for our time, she again mentioned the allegation(s) I may hear about her, to which I responded "If anyone questions our work together in that regard I'll tell them that the person I met with for an hour today followed all of the aspects of our conversation and worked her way logically through a sequence of choices."

Our call ended, and at my end of the line it was back to working on other clients' matters around the office - note what is necessarily implied by this sentence, to wit: Candace was a client of mine by that point.

The next events of Candace's situation occurred in rapid succession, including: a brief call from Candace indicating that her modest retainer would not be used for the Deed discussed (no detail as to whether she'd discussed it with him and felt he could not comprehend it in his deteriorating condition, or if it was simply a bad idea), communication(s) from counsel for the sibling(s) about "access" to their father, and a curious call from a neighbor of the family about how Candace's son Andrew had to sneak out a bedroom window with the father's Will when the adult siblings arrived looking for things while Dad was out getting medical care. The one valuable piece of information, useful for me in serving this client, was the neighbor's name and phone number since Candace was reportedly "not dealing with things too well right now."

ISSUE(S):

As this three-generation family appeared on the brink of disintegrating, one of the greatest and most-legitimate concerns is "will attorneys' fees consume an inordinate amount of the family's wealth (presumably, with Dad's health, in a battle that will see the funds all but guaranteed to become available through probate)?" Potential litigants, besides the vulnerable father who should be respected under all circumstances, at least while he's alive: Candace, her sister Mae as co-legatee in the elusive Will, Candace's two other sisters as Caveator(s), and even the grand-son Andrew and, Yes, the neighbor. Though a multitude of issues exist, a multitude of attorneys probably would be counterproductive as far as the family is concerned.

RULES OF LAW & ETHICS:

As the list of legal issues started growing, an ethical dilemma developed:

Candace began sounding different on the phone, unable to handle multi-part scenarios, so her neighbor made some calls for her; in one or two more face-to-face sessions, she was also visibly different - staring at the ground, moving slowly.

After a week or two, the news came: the father was hospitalized and probably on his death bed, and Candace was in a different hospital's psychiatric ward on a self-admission; I was learning that my client did have a history of unstable periods, which often occurred when under stress, so by this point the neighbor was housing teen-aged Andy and the two of them would call me as the situation evolved.

When asked to help Candace create a Guardianship of the Person for the neighbor (Bertha) to house Andy, I was presented with a crucial question of professional responsibility: the initial retainer was more than exhausted, my client had fallen into some psychiatric condition that made me uncomfortable about her ability to make informed decisions, and if I quote a retainer to

Bertha for her Petition for Guardianship of Candace's child I will start off with mutual Consents to the Conflict of Interest; while that was an unpleasant choice, the client wanted to avoid Social Services placing her teen-aged son with one of her own estranged siblings, and given her return to an unstable mental status in the midst of her father's dying it was hard to imagine her ability to establish a new attorney-client relationship whereby she could achieve her certain goal of having Andy remain in the neighborhood with the neighbor Bertha since some other attorney(s) might struggle so long in creating an attorney-client relationship that the "Andy" objective was jeopardized.

Indeed, I'd learned enough of Candace in the preceding days to know (a) she was mentally unstable, (b) her son's father was of no help even if he would admit to paternity, and (c) she was unable to provide long-term shelter for herself and Andy outside of her own father's house, and he had just died. In short, my client was on the verge of homelessness. The professional responsibility question for me was "Is this client to be abandoned in her time of need?"

A simple decision on a human level was informed at that time by the following from the Rules of Professional Conduct:

Rule 1.14 of the Md. Rules of Professional Conduct '*Client Under a Disability*'

(a) When a client's ability to make adequately considered decisions . . . is impaired . . . the lawyer shall, as far as reasonably possible, maintain a normal client-lawyer relationship with the client.

(b) A lawyer may seek the appointment of a guardian or take other protective action with respect to a client, only when a lawyer reasonably believes that the client cannot adequately act in the client's own interest.

COMMENT

The normal client-lawyer relationship is based upon an assumption that the client, when properly advised and assisted, is capable of making decisions about important matters. When the client . . . suffers from a mental disorder or disability, however, maintaining an ordinary client-lawyer relationship may not be possible in all respects. . . . Nevertheless, . . . to an increasing extent the law recognizes intermediate degrees of competence. . . . The fact that a client suffers from a disability does not diminish the lawyer's obligation to treat the client with attention and respect. If the person has no guardian or legal representative, the lawyer often must act as de facto guardian. . . .

A lawyer representing a person under disability should advocate the position of the disabled person unless the lawyer reasonably concludes that the client is not able to make a considered decision in connection with the matter. . . .

. . . . [I]f a disabled client has substantial property that should be sold for the client's benefit, effective completion of the transaction ordinarily requires appointment of a legal representative. In many circumstances, however, appointment of a legal representative may be expensive or traumatic for the client. Evaluation of these considerations is a matter of professional judgment on the lawyer's part.

. . . . So, with the client's Consent for me to represent Bertha in a Petition for Guardianship of the Person of a Minor in the Orphans' Court, we all took the plunge together.

APPLYING LAW TO FACTS:

The minor's guardianship case has invited the potential for three lawyers: Petitioner's, mother's, and child's (alleged father denies paternity); the probate estate, meanwhile, also invites roles for three legal positions at least - each legatee daughter, plus the other sisters should either file a Caveat (if one of the two legatees does not also become Personal Representative, we are talking another lawyer possibly). The most amazing feature of the tale is that merely two lawyers were able to manage this family's three-generation turmoil.

Southern Maryland lawyer George Meng seized an opportunity early in the process that facilitated the economic management of the situation: the father's Will nominated Candace as Personal Representative, yet Mr. Meng detected a technical point that would possibly bar Candace's actual appointment.

Now, Mr. Meng's client might insist that she be appointed; but, instead, Mr. Meng offered that Candace's counsel would be Personal Representative by consent, and Mr. Meng would be counsel of record to the Personal Representative - each lawyer would still serve their lay client and receive their compensation for work done for that client from their share of the net estate, while the Personal Representative and Mr. Meng as the estate's counsel would look to the "Maximum Allowable Commissions" as the gauge for their combined compensation is serving the estate. We are pleased to report that the attorneys' compensation for their work overall was approved by all.

Admittedly, in the typical middle-class estate of a man with a house, auto, bank account(s) and personalty, most issues are capable of management within reasonable and logical parameters - having said that, many folks still want their day in court on issues as they arise, and some attorneys don't manage such situations and their clients in them (whether from lack of experience, or other reasons). Here, we had (a) "To

Continued on page 13

what extent is a legatee occupying that dwelling responsible for 'rent' during probate?", (b) "Can Candace use the car while she's squatting in Dad's house?", (c) "what if one of the legatees wants to buy the home?," (d) "What if both legatees want certain items of personalty?," (e) "What happened to specific items of personalty?" [always a favorite], (f) "Why does Dad's credit card have multiple charges at Hecht's for women's clothes?," (g) "Can we have advances on our inheritances before the Accounting from the bank accounts?," and lastly (h) "How do you make the water company fix the leaky basement in the days before the house is to be sold?" It is true that one lawyer acting as counsel to the Personal Representative with another acting as Personal Representative, with each attorney appreciating their obligation in the larger context, creates an environment where all issues may be resolved with minimal court involvement.

The details and particulars of issues counsel and the Personal Representative worked through are unimportant for the purposes of this case study. Of greater interest is the

structure of issue spotting and dispute resolution - and, this is where it is very helpful to have many settled principles of probate law, which can be used to focus clients on the likely parameters for the outcome of any legal dispute. This dispute resolution structure came into being naturally, largely through the ability of two adversaries to work with each other. Mr. Meng would monitor the overall Estate to protect the interests of his legatee client and give advice to the Personal Representative, an attorney himself with his own legatee for a client and yet an over-riding duty to the Estate as an officer of the Court. If the Personal Representative identified an issue, his legatee would be brought into the information loop as quickly as possible, before the Estate's attorney if possible, and the client's advice would be evidenced by a letter; if this legatee's input was necessary, verbal input was typically followed by the client's confirmatory act (for instance, the cashing of a check with a clear note on the "memo" line, or a notarized statement, or a note from her doctor). A similar process may have existed for Mr. Meng's side.

Wendy Cartwright as the Chief Judge of the Orphans' Court for Prince George's County was also helpful - the Show Cause Hearing became a mechanism for the Court's input in that the Hearing date could be reset when the case was called on any given date; while the postponement request was being considered, the pending and looming issues would be discussed with the Chief Judge in order for her to confirm the parameters of law on the record so all the family could appreciate where the issues were heading. Perhaps as much as anything that lent itself to efficient dispute resolution was the legatee clients' shared appreciation for the extent to which their limited inheritances would be depleted by aggressive litigation, thus causing them to become manageable clients.

As of the writing of this case study, the child's with Bertha and Bertha has been advanced enough funds to get through the school year while the child remains in the community that he called home when living under his grandfather's house - with this lingering issue unresolved, the entire situation can be viewed as a successful story of lawyers helping a family through a most-difficult time, however inevitable the death of the patron was.

Taking Attorney Fees From An Estate *By: George E. Meng*

On March 11, 2008, the Court of Appeals again addressed the issue of attorneys fees paid by a decedent's estate. The case is Attorney Grievance Comm'n v. Kendrick, <http://mdcourts.gov/opinions/coa/2008/35a06ag.pdf>.

The message from this case is one that has been stated by the Court in the past. But, even so, it is one that bears constant repeating. Simply put, statutes govern taking any attorney fees from an estate. Other than by consent as authorized under ET 7-604, if you take an attorney fee from an estate, you had better have a court order in hand approving the fee. And, this applies to personal injury attorneys' contingent fees. Do not delude yourself into thinking that you are exempt because you have taken your contingent fee before distribution to the estate. In

those cases where a decedent's estate is your client, the contingent fee you take is paid by the estate. That is true whether the gross is distributed to the estate and you then take your fee or you take your fee off the top and distribute the balance to the estate. And, while I'm on the subject of estate money, it must be within the control of the Personal Representative and thus should not be held in an attorney's escrow account (where it is under the control of the attorney, not the PR) unless you are doing so by court order.

The message to Ms. Kendrick is one those of you not proficient in estate administration should carefully note. The Court wrote: "It is clear from the record that Respondent's failure to comply with probate law in the administration of the Estate was due to

her inexperience and her unwillingness to obtain the help she needed to properly administer the estate. As the hearing judge stated in his analysis, 'inexperience does not necessarily amount to a violation of this Rule.' We have said, however, **that attorneys who undertake legal work in areas unfamiliar to them 'must take careful thought as to their competence to practice in "specialty" areas,' like the administration of estates....** If an attorney 'plunges into a field in which he or she is not competent, and as a consequence makes mistakes that demonstrate incompetence, the Code [of Professional Responsibility] demands that discipline be imposed; that one is simply a general practitioner who knew no better is no defense."

Maryland's Evolving Spousal Elective Share: Where Will It End?

By Agnes C. Powell, P.C.

This article focuses on recent changes in judicial interpretations of the reach of Maryland's spousal elective share beyond the probate estate to allow a surviving spouse to claim a forced share of non-probate assets. It looks briefly at [i] the evolving history and rationale behind the elective share from its common law origin to Maryland's most recent Court decision, [ii] at how various states have expanded the reach of their forced share statutes and [iii] where Maryland's share is likely headed in the future. Finally, the author offers suggestions on how to advise clients in the current unstable and unclear landscape.

The History of the Elective Share

Dower and Curtesy. The elective share derives from old English common law and in its earliest form, [i] dower gave a wife (W) life estate rights in her husband's (H) real property and [ii] curtesy gave H rights in W's real property if there were surviving children. The share's different treatment of spouses reflected a time when married women could not own property and did not work outside the home and so, were financially dependent upon their husbands.

Early Elective Share Laws. In the last half of the 20th century, increasing financial equality between the sexes led first to equal sexual treatment, and ultimately, to the repeal of dower and curtesy laws. Similarly, the rationale for the share changed from one based on the surviving spouse's (SS) need to the family law view of marriage as an economic partnership in which the first-to-die should not be able to disinherit the survivor.

Dower and curtesy were replaced with the elective share which still aimed to protect SS' rights, giving a disinherited spouse the right to elect against – or dissent from – the Will of a testate spouse or to take a statutory

share of an intestate's estate. The traditional elective share [i] applied only to assets in the probate estate and [ii] was a fixed fraction -- between $\frac{1}{2}$ and $\frac{1}{3}$, depending on whether a decedent (D) left surviving minor children, children from a previous marriage, etc. However, in the late 20th century, SS' protection under elective share laws began to erode as increasing amounts of wealth passed outside of probate -- in non-probate transfers: (a) "beneficiary assets" -- life insurance, retirement assets, pay-on-death (POD) and transfer-on-death (TOD) bank and brokerage accounts, (b) jointly owned property, and (c) assets used to fund inter vivos revocable living trusts (RLT).

The Evolving Elective Share

The Augmented Estate Elective Share. With the increasing popularity of non-probate wealth vehicles, some states passed augmented estate statutes that brought non-probate assets back into the probate estate for purposes of computing the spousal share. E.g., N.Y. now equates wills and "will substitutes" like the RLT, and specifically includes RLT assets in the computation of the elective share. Maine augments its probate estate with gratuitous transfers in which D retained a life interest, but excludes beneficiary assets like life insurance and retirement assets. Florida's augmented estate includes jointly-owned property, but excludes jointly-owned real property in other states. Virginia's augmented estate includes the probate estate [i] plus non-probate assets, [ii] plus certain of D's inter vivos transfers, [iii] minus probate and non-probate assets going to SS. States with augmented estate laws necessarily have rules for calculating the augmented estate, instructing, e.g., how to value property, how to add back property passing to SS, and whether SS' separate property is included in the calculation.

The Equitable Elective Share. The 1969 Uniform Probate Code embraced the augmented estate, but in order to prevent a windfall going to SS after a brief marriage, the UPC

equitably based SS' share on the length of the marriage. I.e., the longer the marriage, the greater the percentage of the augmented estate SS was entitled to. To date, 20 states (excluding Maryland) have adopted the UPC in varying forms. E.g., some states adopted the proportional percentage, while others increased their fractional share to 50%.

Courts and the Evolving Elective Share

Increased, more complex litigation. The evolving elective share laws have increased probate litigation and made it more complicated. E.g., the Sexton v. Cornett decedent was a Va. state employee who left [i] no probate estate and [ii] a non-probate estate that included employer-provided life insurance and retirement benefits. D left no children; was involved in divorce proceedings at the time of his death; and months before his death, had changed his insurance and retirement beneficiary from his wife to his sister and her child. Faced with deciding whether Va's 1990 augmented estate statute partially repealed older laws exempting state employment benefits from "attack of any kind," the Wyeth Co., Va. Circuit Court in Sexton held that D's non-probate assets were exempt from the augmented estate calculation, noting, inter alia, the many retirement plans designed in reliance on the older laws.

In Est. of Luken, D was survived by SS and adult children from D's previous marriage. The Cass Co., N.D. District Court assigned SS the burden of rebutting the UPC presumption that any property he owned at D's death was derived from her, and held that if SS couldn't produce "sufficient credible evidence" to the contrary, all of his assets would be included in the calculation of his elective share – thereby reducing his claim on D's assets. SS was required by subpoena from D's estate to disclose all of his property and to "trace" its origin. The district court had to decide [i] what type and amount of "credible evidence" was required to rebut the

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UPC presumption and [ii] how to value SS' closely-held business. In deciding whether to include SS' wrongful death proceeds in the augmented estate, the Alaska Supreme Court in *Maldonado v. Bailey* decided that SS had no interest in the proceeds before D's death and remanded for a decision on what portion of the proceeds were probate assets under state law.

Conflict of Laws. Because the UPC is the most comprehensive reform and codification of estates and probate law ever, states have passed different versions – and varying portions -- of the UPC. E.g., unlike Florida, Michigan's version of the UPC does not specify whether out-of-state real property is included in the calculation of the elective share, raising such questions as: is out-of-state real property in state B included in the elective share of state A? Can D, owning real property in different jurisdictions, specify in his Will which state law controls? Can state B deny SS' elective share if D was a non-resident owner of property in state B?

Maryland Courts and the Evolving Elective Share

Knell v. Price. Maryland courts first ventured into the evolving elective share waters in *Knell v. Price*, where D and SS had separated after 22 years of marriage and D had subsequently lived with his mistress (M) for the next 27 years. When D purchased the Kent Co. home where he and M lived, he gave himself a "life estate with powers," with the remainder to M. At D's death, SS claimed that the property should be included in the calculation of her elective share. The Md. Court of Appeals, citing D's retention of a life interest in this non-probate asset, held that D's effort to pass the property outside of probate to M was, as a matter of law, a fraud on SS' marital rights. The *Knell* Court, however, did not clarify if the reach of its decision included any other non-probate assets, leaving much ambiguity from 1990 until 2007 when *Schoukroun v. Karsenty* was decided.

Md's most recent decision on the scope

of the elective share. The *Schoukroun* D died in 2004, being survived by SS. D was previously married to S1, who bore his only child (C) who was age 14 at his death. D and S1 signed a Separation and Property Agreement that was incorporated but not merged into their divorce decree that required each of them to keep a \$150,000.00 life insurance policy on their lives that named C as the irrevocable beneficiary. Instead of having the life policy required by his and S1's Agreement, D created a revocable living trust for C's benefit and funded it with \$422,000.00 in TOD accounts. At D's death, SS asked the Anne Arundel Co. Circuit Court to impose a constructive trust on the RLT accounts, claiming that under *Knell*, D's transfer of the TOD accounts while retaining a life interest in the RLT was, as a matter of law, a fraud on her marital rights. The Circuit Court ruled against SS, saying that the minor child had a "higher equitable call on the property" than SS. However, the Md. Court of Special Appeals concurred in SS' bright line reading of *Knell*, explaining that as a result of D's decision to retain for life the right to revoke his RLT, all of the RLT assets were included in his estate for purposes of calculating SS' elective share.

Does Schoukroun add clarity?

Under *Knell* and *Schoukroun*, it is clear that Maryland now has a judicially-created augmented estate, but very few rules for its calculation. *Schoukroun* clarified that [i] RLT assets are included in Md's augmented estate and [ii] the inclusion is as a matter of law, such that SS no longer has to prove fraud. However, if one assumes that other "beneficiary" assets like POD accounts are included in the augmented estate, we do not know -- as the *Sexton* case in Va. illustrates, whether qualified retirement assets created under federal law are included? If we assume that joint bank accounts are also included in *Knell's* judicially-created augmented estate, and maybe, following Michigan, also joint real property located in Md., we still don't know whether, like Florida, Md. excludes real property in

other states. *Schoukroun* tells us more about what we don't know than what we do know.

Maryland and the UPC. This author sits on the Md State Bar Ass'n ("MSBA") Estates & Trusts Section Council, and has been privy to their discussion of whether Md. should adopt the UPC, which UPC provisions to adopt intact, which to revise, and which to exclude. While the MSBA E&T Section Council agrees that adoption of some version of the UPC is needed to clarify *Knell's* ambiguity, it has struggled with this most comprehensive reform and codification of estates and probate law ever. In 2000, when few states had passed some version of the UPC, the Section Council did a lengthy, in-depth study of the UPC and produced a "marked up" version that was presented to the state legislature. However, the very scope and complexity of the bill doomed its passage, as legislators decided to wait for more states to act. Even though more states have now adopted the UPC, its very complexity still stymies the E&T Section Council, which wisely has decided to make Md's evolving elective share the focus of its CLE at the MSBA annual meeting this summer in Ocean City. Because the topic impacts several practice areas, the CLE will be co-sponsored by the MSBA Family Law and Elder Law sections in order to [i] make the general bar aware of *Knell's* ambiguity and the UPC's complexity and [ii] get whatever input bar members wish to offer.

What is the current rationale?

What cost? As Md. Courts, the MSBA, and the legislature revise Md's elective share, they may first wish to clarify the current purpose of the share for 21st century spouses. If its purpose is to provide for a needy SS, the UPC's equitable percentage is less protection for a needy but newly-married spouse than a fixed percentage. If its purpose derives from marriage as an economic partnership, reviving dower and curtesy – given that real estate is often the major asset in modest estates – might be a simpler way to protect SS from inter vivos or posthumous alienation of real

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estate. In the marriages of yesteryear, assets passing to SS would be used to care for D's and SS' children. If equity is a concern today when blended families are numerous, should a wealthy SS' rights trump those of D's needy, minor children from a former marriage? This author feels that clarifying the purpose might clarify the path of revision.

Advising Clients under the Knell v. Price Ambiguity

Prenuptial Agreements. Despite that most couples don't seek legal advice before marrying, the best way for clients to avoid the uncertain computation of Knell's augmented estate is to enter pre- or post-nuptial agreements that clarify SS' rights in D's estate. Second, since it's clear that Knell does not reach D's irrevocable inter vivos transfers, we may wish to advise clients to not just make irrevocable transfers, but to complete them as soon as possible. I.e., donors must worry about completing transfers outside the IRC §2036 3-year

period which brings irrevocable inter vivos transfers made within 3 years of death back into D's estate for federal estate tax purposes, as well as, e.g., Va's augmented estate that includes transfers made within 5 years of death. Clients considering joint real property purchases may wish to buy in states where the elective share doesn't reach non-probate real property.

Md. Medicaid planning. After Schoukroun, Md's evolving elective share poses greater concerns for

Medicaid planning, where spouses' estate plans may require an institutionalized spouse to completely divest and the community spouse to have a minimal probate estate. Augmenting D's estate for purposes of calculating the institutionalized SS' elective share completely thwarts Medicaid planning and may result in more drastic measures like divorces among these elderly couples.

STEPHEN J. DUNN ATTORNEY AT LAW

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On February 28, 2008, the Prince George Bar Association held its' third session of **Law 101**. This session had four panel members: Judge Michele Hotten, Judge Sean Wallace, Judge Leo Green, and Mr. Erik Nyce, Esquire. The topic was relevant issues regarding Pretrial Conferences in Prince George's County. An outline was given with rules of interest to practitioners. This outline is available on the PGCBA web site.

The panel expressed the importance of accurately completing the Case Information Report when filing your case. When estimating the length of trial, be aware that 7 hours is considered to be one full day. However, Judge Hotten explained that the Track that a particular case may be assigned to is determined more by the complexity of the case rather than the length of trial. Once your case is received a Judge will review the case and independently determine whether it is Track 1, 2, etc.

The Court will then generate a Scheduling Order indicating the Track and Motions Judge a case is assigned to along with the important dates and deadlines, one of which is the Pretrial Conference. Prior to the Pretrial Conference, the attorneys must prepare a Pretrial Statement pursuant to MD Rule 2 504.2. That rule sets forth the contents of the Pretrial Statement. It varies by Judge as to how detailed your Pretrial Statement must be, but you may be bound by the contents of your Statement. Pay particular attention to the request for your expert and non expert witnesses and the exhibits you plan to use at trial. Judge Hotten also cautioned that if you file the Pretrial Statement a day or two before the Pretrial Conference, it may not catch up to the file in time so you should send a copy directly to Judge's Chambers or bring a copy with you.

The panel then briefly discussed a few inadequacies in the Rules with regard to advances in technology. Rule 2 504.3, computer generated evidence, mandates a 90 day notice requirement. Mr. Nyce questioned whether photographs taken on a digital camera were considered to be computer generated evidence under Rule 2 504.3. The panel took the position that these photographs were computer stored, not computer generated. In addition, how does HIPPA affect disclosure of the names of health care providers in the Pretrial Statement which is available to the public.

The purpose of the Pretrial Conference is to set the trial date and identify and address any administrative or scheduling issues that may arise before or during trial. Judge Wallace and Judge Hotten identified what they are looking for at the Pretrial Conference. The Judge is interested in any issues that may be stipulated to and he or she attempts to assess the parties dispute of liability.

The parties should anticipate any issues which may arise. For example the Judge should be made aware of any pending or if a party is intending to file a dispositive motions. At the conference, the Judge will also ask whether the parties will benefit from ADR.

The attorneys must identify the number of fact witnesses, expert witnesses, and exhibits and estimate the length of trial. Judge Hotten also stressed the importance of indicating whether or not an interpreter will be needed for trial.

Judge Green then explained that the District Court has historically been known as the "People's Court" and discussed issues particular to that Venue. The District Court is the forum of choice for pro se litigants as well as attorneys. Pro se litigants will be given a little more leeway in discovery Motions. The history of the increases in the District Court jurisdiction as well as the increase in the minimum jury trial amount was discussed. That Court along with its efficiency and expediency in rendering an accurate decision will continue to be the forum of choice for many. Judge Green described his magnanimous open door policy in dealing with administration of cases and specially setting matters which take longer than two hours.

After the panelists spoke, the floor was opened for questions. As in previous Law 101 sessions, several of the questions discussed scheduling orders and the importance of compliance with these orders.

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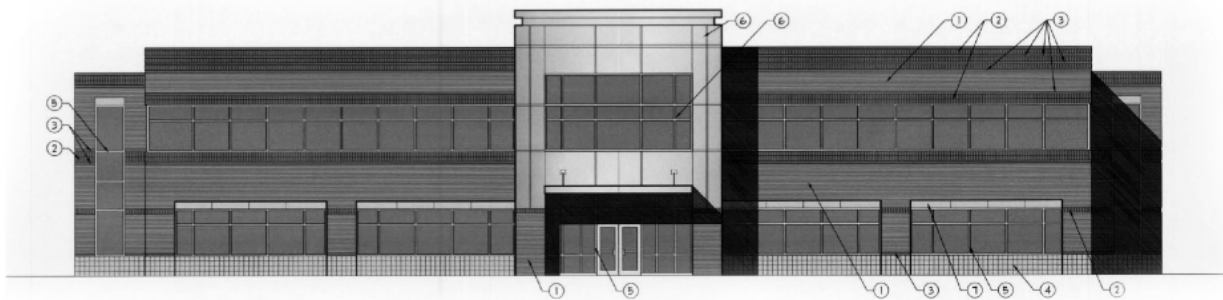
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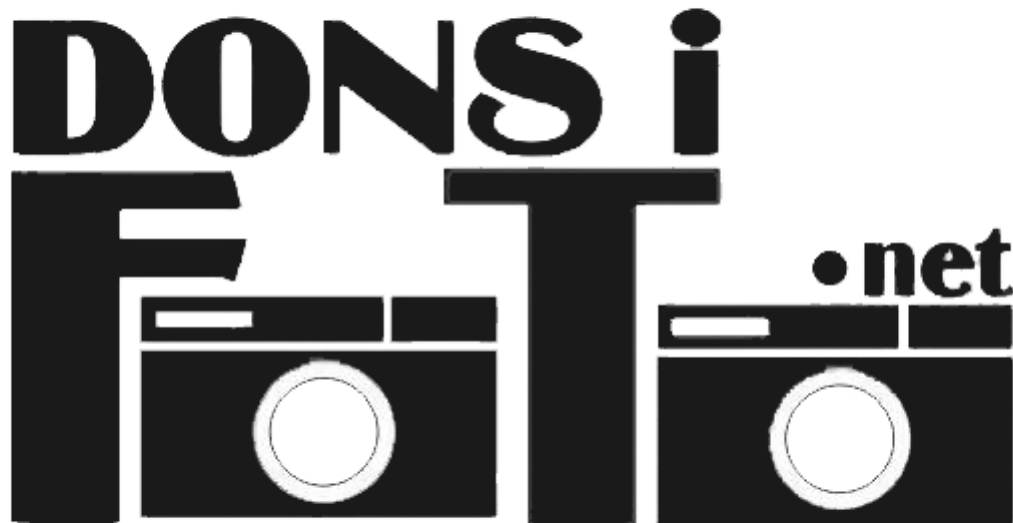
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<p>Saturday, May 17, 2008 8th Annual PGCBA Family Law Seminar "It's All About the Kids" Jury Room-Courthouse 8:30 AM – 1:15 PM</p>	<p>Monday, June 2, 2008 Golf Tournament Marlton Golf Course</p>	<p>Tuesday, June 10, 2008 General Membership Meeting Newton White Mansion 6:00 PM</p>

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