



CIRCUIT COURT FOR _____, **MARYLAND**

City/County

Located at

Court Address

Telephone

Case No.

In the Matter of

Name of Minor or Alleged Disabled Person

Docket Reference

MOTION FOR A SPECIFIC TRANSACTION
(Estates & Trusts Art. § 13-204 & Md. Rule 10-304.2)

NOTES: Use this form to ask a court for an order that allows you or another person to take a one-time or limited action related to a minor's or an alleged disabled person's property, money, or benefits. This is called a specific transaction. A specific transaction is a less restrictive alternative to guardianship of the property. Learn more about alternatives to guardianship at www.mdcourts.gov/alternatives.

- This motion must be filed with a petition for guardianship of the property or after a petition has been filed. After the motion is filed, the court will issue a "show cause order." You need to arrange for another person to give a copy of the show cause order and all papers you file in the case to the other parties in the case through a process called "service." Learn more about service at www.mdcourts.gov/ccservice.
- Note: If this Motion is not being filed with the Petition for Guardianship, then you must attach a Certificate of Service (CC-DC-128) with this filing.
- Attach additional pages or documents to support your request if needed.
- To ask the court to hold an expedited (sooner) hearing on this motion, file a Request for an Expedited Hearing on a Motion for a Specific Transaction (Form CC-GN-061) with your motion.

My name is _____, my address is _____
Name Address

_____, my telephone number is _____
Address Continued Telephone Number

and my e-mail address (if any) is _____ . My organization
E-mail

(if any) is _____ . I am _____ years old. My relationship
Organization Age

to the ☐ minor ☐ alleged disabled person, _____, is
Name of Minor or Alleged Disabled Person

_____. My relationship to the person who petitioned for guardianship of
Relationship

the property ☐ self ☐ other _____ . I state that:
Relationship

1. **Petition for Guardianship of the Property.** I have, or another person has, filed a Petition for Guardianship ☐ of the property ☐ of the person and property of the minor/alleged disabled person in this court on _____ .
Date
2. **The person's need.** The minor/alleged disabled person has a need that a specific transaction can address. Specifically: *(Describe the problem you think the specific transaction can solve.)*

3. **Type of specific transaction.** I believe the following type of specific transaction can meet this need: *(Select the type of transaction and under, “Description,” explain what would need to happen to perform the transaction.)*

<u>Specific Transaction</u>	<u>Description of how the specific transaction would be performed</u>
☐ access to the person’s financial or other records.	
☐ establish the person’s eligibility for government benefits, including Medical Assistance.	
☐ set up direct deposit or automatic payment services.	
☐ arrange for the payment, delivery, deposit, or retention of the person’s money or property.	
☐ sell, mortgage, lease, or transfer the person’s property.	
☐ purchase contracts for an annuity, life care, training, or education for the person.	
☐ elect to take an elective share of an estate.	
☐ other (describe): _____ _____	

4. **Authority to perform the specific transaction. (Select all that apply.)**

☐ The minor or alleged disabled person is not able to complete the specific transaction because:

☐ There is no one else with the authority to complete the specific transaction for the minor or alleged disabled person.

☐ _____, whose relationship to the minor or alleged disabled person is _____, has authority to complete the specific transaction, but cannot or will not because:

5. **Need for a guardian of the property.** The specific transaction is all that is needed to meet the minor’s or alleged disabled person’s need. A full guardianship of the property is not needed because: *(Provide facts that show why a specific transaction can accomplish what needs to happen to the minor’s/alleged disabled person’s money, property, or benefits. Include any other alternatives to guardianship that address the person’s other needs.)*

6. **Person who can perform the specific transaction.** *(You can ask that you perform the specific transaction, another person, or the court to find someone to perform it.)*
(Select all that apply.)

☐ **I can perform the specific transaction.**

- a. I ☐ have ☐ have not been charged with or convicted of fraud, extortion, embezzlement, forgery, perjury, theft, or any other crime that would call into question my honesty, trustworthiness, or fitness to perform the specific transaction or serve as guardian of the property. *(If you have been charged with or convicted of one of these crimes, list the charge, the year, and the court where any conviction occurred. List any reasons you should still be given authority to perform the specific transaction.)*

<u>Charge</u>	<u>Year</u>	<u>Court</u>

I should still be given authority to perform the specific transaction even with these charges and convictions because:

- b. I am qualified to perform the specific transaction because: *(Describe any education, training, experience, knowledge, or skills showing that you can perform the specific transaction.)*

☐ **Another person can perform the specific transaction.**

I believe that _____, whose address is _____
Name Address
_____, telephone number is _____,
Address Continued Telephone Number
and e-mail address (if any) is _____ can perform the
E-mail
specific transaction. Their organization (if any) is _____.
Organization
They are _____ years old. Their relationship to the minor or alleged disabled person is
Age
_____, and their relationship to the person who petitioned for
Relationship
guardianship is _____.
Relationship

- a. To the best of my knowledge, information, and belief, this person ☐ has ☐ has not been charged with or convicted of fraud, extortion, embezzlement, forgery, perjury, theft, or any other crime that would call into question my honesty, trustworthiness, or fitness to perform the specific transaction or serve as guardian of the property. ***(If this person has been charged with or convicted of one of these crimes, list the charge, the year, and the court where any conviction occurred. List any reasons they should still be given authority to perform the specific transaction.)***

<u>Charge</u>	<u>Year</u>	<u>Court</u>

This person should still be given authority to perform the specific transaction even with these charges and convictions because:

- b. This person is qualified to perform the specific transaction because: ***(Describe any education, training, experience, knowledge, or skills showing that the person can perform the specific transaction):***

☐ **I am asking the court to find someone to perform the specific transaction.**

7. **Level of intrusion.** If ordered by the court, the specific transaction will affect the rights or interests of the minor/alleged disabled person in the following ways: *(Describe how the specific transaction might affect the person or their money, property, or benefits.):*

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8. **Creditors.** *(Creditors include any person or company to whom the minor or alleged disabled person may owe money (banks, other financial institutions, credit card companies, lenders, etc.).)*
(Select one):

☐ I am not aware of any creditors.

☐ The minor/alleged disabled person has the following creditors *(For example, if the person has a car loan, name the lender, describe the car, and provide the amount owed on the loan):*

Name of creditor	Description	Amount

9. **Dependents.** *(Dependents include any child or other person who depends on the minor/alleged disabled person for financial support.)*
(Select one):

☐ I am not aware of any dependents.

☐ The minor/alleged disabled person has the following dependents: *(For example, if the person pays child support, name the child, list "child support" as the description, and provide the amount and frequency of payments):*

Dependent	Type of Support	Amount and frequency of support

FOR THESE REASONS, I ask the court to *(select all that apply)*:

- ☐ authorize or direct me to perform the specific transaction described above.
- ☐ authorize or direct _____ to perform the specific transaction
described above. Name
- ☐ authorize or direct a person identified by the court to perform the specific transaction
described above.
- ☐ other *(describe)*:

- ☒ order any other appropriate relief.

I solemnly affirm under the penalties of perjury that the contents of this document are true to the best of my knowledge, information, and belief.

Date

Signature

Street Address

Printed Name

City, State, Zip

Telephone Number

E-mail

Fax