



Tuesday
April 12, 2016
 5:30pm—8:30pm

Location:
 Essex County
 Veterans Courthouse
 50 West Market Street
 Room 714
 Newark, NJ

**ECBA YLS/Public Sector
 Attorneys**
\$40

ECBA Members
\$60

Non-members
\$75

NJ (*NOT SO*) BASIC ESTATE ADMINISTRATION & PLANNING

DISTINGUISHED PANEL

Hon. Theodore N. Stephens, II
Essex County Surrogate

Susan Dromsky-Reed, Esq.
Brach Eichler, LLC

Denice P. Gilchrist, Esq.
*Law Offices of
 Denice P. Gilchrist, LLC*

Charles N. Persing
*CPA/CFF, CIRA, CVA, CFE
 Bederson LLP*

Moderator: Michael Rankin, Esq.
Kozyra & Hartz, LLC

This program will provide you with an understanding of the not so basics of NJ Estate Planning and Administration, including thorough discussions of :

Estate Planning

- * Devising plans and Drafting including coordination with beneficiary designations and spousal elective share
- * Implementation including funding and attendant tax implications
- * Post death planning including use of disclaimers, subsequent gifting and income tax planning

Probate and Administration Process

- * Surrogates Office, role and responsibilities
- * Surrogate's Court vs. Superior Court jurisdiction and matters heard including "Over the Counter" Matters, Orders to Show Cause and Spousal Elective Share
- * Probate and Administration filings
- * Who can function as an Administrator

Estate Administration

- * What to do first, locating and validating the Last Will and Testament, securing death certificates
- * Gathering and identifying Assets
- * Distribution and funding of Trusts
- * IRA, 401 (k) and Life Insurance payout considerations
- * Taxes: Inheritance, Estate and Income
- * Closing the Estate

This program has been approved by the Board on Continuing Legal Education of the Supreme Court of New Jersey for 3.4 hours of total CLE credits. This program partially satisfies the requirements for a newly admitted attorney under NJ BCLE Rule 201.2. CLE Credits available for NY pursuant to reciprocity. 2.8 CLE Credits available for PA. *PA credits subject to a \$10 processing fee.

Estate Admin & Planning Program 4/12/16

Please return reservation form and payment to ECBF, Essex County Bar Foundation,
 470 Dr. Martin Luther King, Jr. Blvd., Room B01, Newark, NJ 07102,
 Phone 973-622-6207 · Fax 973-622-4341 · Email wsdeer@essexbar.com

Name/Affiliation _____

Address _____

Phone _____ E-mail _____ @ _____

X \$ _____ = No. of Reservations (members)	X \$ _____ = No. of Reservations (Non-members)	CLE Credits: NJ NY PA* <small>*fee included</small>
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