



Garden State CLE
 21 Winthrop Road • Lawrenceville, New Jersey 08648
 (609) 895-0046 fax- 609-895-1899
Atty2starz@aol.com

Video Course Evaluation Form

Attorney Name _____

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Name of Course You Just Watched _____

Please Circle the Appropriate Answer

Instructors: Poor Satisfactory Good Excellent

Materials: Poor Satisfactory Good Excellent

CLE Rating: Poor Satisfactory Good Excellent

Required: When you hear the bell sound, write down the secret word that appears on your screen on this form.

Word #1 was: _____ Word #2 was: _____

Word #3 was: _____ Word #4 was: _____

What did you like most about the seminar?

What criticisms, if any, do you have?

I Certify that I watched, in its entirety, the above-listed CLE Course

Signature _____ Date _____

GARDEN STATE CLE LESSON PLAN

A 2.0 CLE CREDIT COURSE

FREE DOWNLOAD LESSON PLAN AND EVALUATION

BRIDGING THE GAP: BASIC ESTATE ADMINISTRATION

**WITH HON. LOUIS SANCINITO,
TRENTON MUNICIPAL COURT JUDGE (ret.) AND
PROBATE PRACTITIONER**

AND FEATURING

ROBERT RAMSEY, SENIOR INSTRUCTOR

Program Description

This “Bridging the Gap” presentation will provide you with all you need to know about drafting wills and guiding an estate through county probate procedures.

I. INTRODUCTION

II. WHEN IS THE BEST TIME FOR EXECUTING A WILL

- a. Often, it is a couple coming for a Will
- b. Reciprocal wills, one for each spouse
- c. Civil unions and people who reside together
- d. Where is the best place to store a Will: don't give a copy out, just tell the Executor where it is in the home
- e. Safe deposit box may result in bank refusal to open the box absent issuance of Letters qualifying the Executor or Administrator to act for the Estate

III. WILL PROVISIONS

- a. Disposition of the body
- b. Simultaneous death clauses
- c. Specific bequests
- d. Check the named beneficiaries on insurance policies, pensions, other property, CDs, IRAs and 401K Plans, brokerage accounts
- e. List a residual beneficiary, often the spouse
- f. Choose an Executor and Substitutes
- g. Make your Will self-proving

IV. COMPETENCY AND UNDUE INFLUENCE

- a. Discern the influence if any, and competence
- b. Videotaping is an option
- c. Avoid involvement in later Will fight/contest

IV. PROBATE OF A WILL

- a. Initial call is basic information communication
- b. 10-day waiting period for filing in court
- c. Obtain death certificate from Funeral Director
- d. Send notices to beneficiaries and related parties
- e. Letters Testamentary are issued by the Court

V. AFTER PROBATE IS GRANTED

- a. Open an Estate account
- b. Follow the will provisions
- c. Pay the debts and assemble the assets
- d. File the last tax return for the decedent
- e. File tax returns for the Estate, if required
- f. Obtain tax waivers for the Estate
- g. Telephone your client

VII. FORMS

- a. Will, short form
- b. Living Will, notarized but not self proving
- c. Power of Attorney, can be Limited or General, and Durable Powers are favored
- d. Will, long form, with Testamentary Trust and Special Needs Trust (get tax advice)
- e. Executor's Short Certificate granting Letters Testamentary
- f. Estate Tax Return (prepare yourself or have an accountant prepare it?)
- g. Formal Accounting

VIII. ADVICE FOR YOUNG ATTORNEYS

- Talk to people, understand their needs and make them understand the options