



PROGRAM ANNOUNCEMENT

The Advocacy Institute Is Pleased to Present

THE BASICS OF ESTATE PLANNING

August 17, 2017

1:00 p.m. – 3:00 p.m.

124 Halsey Street

5th Floor – Room 10-C

Newark, New Jersey

THIS COURSE WILL BE SIMULCAST FROM TRENTON

Please note: Because this course will be simulcast from Trenton, the following CLE regulations apply to credits earned by attending the course in Newark:

New Jersey: The simulcast of this course is an Alternate Verifiable Learning Format (AVF) Program. Courses taken through alternative verifiable learning formats shall account for no more than twelve credit hours per compliance period.

Pennsylvania and New York: The simulcast of this course is a Distance Learning Program. Credits earned via Distance Learning Programs in excess of the annual CLE credit limit will not carry over into subsequent compliance periods.

PLEASE READ: NOTICE REGARDING COURSE MATERIALS

You will receive the course materials approximately forty-eight (48) hours prior to the date of the course. The materials will be contained in an email attachment.

Program Summary

The presentation will feature an overview on the basics of the estate planning process and will provide key takeaways needed in order to formulate and implement a thorough and customized estate plan. The course will provide attendees with a clear understanding of what an estate is and what should and should not be included in a basic New Jersey and Pennsylvania estate plan. The session will also discuss the benefits of having a will and testamentary trusts, and what happens when an individual does not have a will. There will also be a discussion on digital assets and beneficiary designations, the importance and purposes of financial and healthcare Powers of Attorney and Advanced Medical Directives; and tips and tricks for gifting strategies that will assist in reducing or eliminating inheritance and estate taxes.

Who Should Attend?

This presentation is open to all government attorneys, space allowing. This course will be of special interest to newly-admitted New Jersey attorneys seeking to earn subject-specific credits for their first CLE cycle.

Who Is the Faculty?

Jennifer L. Zegel is a partner in the Philadelphia Office of Reger Rizzo & Darnall LLP. She represents clients in the areas of estates and trusts, business law, real estate, and employment law. Ms. Zegel handles a wide range of estate and trust matters, including drafting wills, trusts, special needs trusts, powers of attorney, and health care powers of attorney documents. She also assists clients in estate, trust, and guardianship administration, business succession planning, and estate planning. Ms. Zegel holds a B.A. from Temple University, a J.D. from Rutgers University School of Law, Camden and an LL.M. in Taxation from Temple University Beasley School of Law.

CLE Credit

NJ CLE Credit: This program had been approved by the Board on Continuing Legal Education of the Supreme Court of New Jersey for 2.0 hours of total Alternative Verifiable Learning Format (AVF) CLE credit. Of these, 0.0 qualify as hours of credit for ethics/professionalism.

NY CLE Credit: 2.0 Distance Learning Program Substantive credits (pursuant to the approved jurisdiction policy).

PA CLE Credit: 1.5 Distance Learning Program Substantive credits (\$3.00 mandatory registration fee required).

How Do I Register?

State Employees

Most State employees are able to register for this course by going to <http://reg2.dcj.lps.state.nj.us/lpcreg/login.aspx?portalid=2> and creating an AGAI Course Registration account. To do so, your computer **must** be attached to the government's Garden State Network. Upon opening the AGAI Course Registration System home page, you will see the Create Account link in the Login Box. Click on it and create your account, which will include you selecting a user name and password. Once you create your account, you can access the AGAI Course Registration System at <http://reg2.dcj.lps.state.nj.us/lpcreg/login.aspx?portalid=2> to register for future courses or to manage your account. Please retain your user name and password for your records.

Non-State Employees or State Employees not Connected to the Garden State Network

If you are not a State employee, or are otherwise unable to access the AGAI Course Registration System through the Garden State Network, kindly email the Advocacy Institute at: njagai@njoag.gov for an authorization code to allow you access to the AGAI Course Registration System through the My New Jersey portal. **Setting up your account through the**

portal is a two-step process, the details of which are set forth in the next two paragraphs.

Once you receive the portal authorization code you will be prompted to go to the My New Jersey portal at <http://www.state.nj.us/> and create a portal account. Once your portal account is created you are prompted to enter your authorization code. This is Step 1 of the process, which you need only do once.

If you have already been issued an authorization code in the past you do not need to request another one. You can log into your account on the Garden State Network at <http://www.state.nj.us> and under the heading NJ L&PS Applications you will see the Attorney General's Advocacy Institute's Registration System. Click on that and log into your account on our system.

Upon setting up your portal account, you need to set up your AGAI Course Registration System account. This is Step 2. To do so, log on to the My New Jersey Portal <http://www.state.nj.us/>. Upon opening the AGAI Course Registration System home page, you will see the Create Account link in the Login Box. Click on it and create your account, which will include you selecting a new user name and password. Once you create your account, you can access the AGAI Course Registration System at <http://reg2.dcj.lps.state.nj.us/lpcreg/login.aspx?portalid=2> to register for future courses or to manage your account. Please retain your user name and password for your records.