New Jersey Probate Process: In 7 Simple Steps

Live Webinar
August 9, 2023

Event Sponsor: National Business Institute

Michael K. Feinberg, a partner in the firm's Tax, Trusts & Estates Department, will be on the faculty for the program "New Jersey Probate Process: In 7 Simple Steps," which will be presented as a live webinar on Wednesday, August 9, 2023 from 9:00am – 4:30pm by the National Business Institute (NBI).

This step-by-step practical full day online seminar will offer essential knowledge of probate processes and best practices for handling each unique case effectively, including tackle crucial first steps; handling the personal executive; gathering, valuing, and distributing all assets; and successfully completing the final accounting and tax returns.

Mr. Feinberg will present a segment on "Handling Estate Closing, Final Accounting, and Tax Returns" and will cover the following issues:

- Tax Returns and Deadlines - Estate and Income, State and Federal, Decedent's and the Estate's
- Informal Closing by Statement of Personal Representative
- Compiling and Balancing the Final Account
- Final Distributions to Beneficiaries and Liability of Distributees
- Closing the Estate and Discharging the Fiduciary

The program's faculty will also address the following topics:

- Opening the Estate
- Preparing the Personal Representatives for the Job
- Managing the Estate: Valuations, Spousal Share, and More
- Addressing Creditor Claims
- Post-Mortem Tax Planning, Distributions, and Trust Administration

Attorneys

Michael K. Feinberg

- Maintaining an Ethical Practice
- Resolving Disputes and Navigating Probate Litigation

Mr. Feinberg focuses his practice on estate planning, estate administration, elder law, wills and trusts, tax and business planning for individuals, corporations, partnerships and limited liability companies, and tax controversies. He serves as a strategic advisor to individuals, families, business owners, executors and trustees, counseling clients on a comprehensive range of issues within the areas of tax, trust and estate law.

Additional information and registration details on the NBI website.