

SURROGATE

James S. LaCorte

2016 Budget Presentation

Mission

The mission of the Office of the Surrogate is to comply with the mandates of N.J.S.A 2:5-1 et seq. and 3B:1 et seq. as they relate to Wills, Administrations, Guardianships etc; to be receptive to the needs of the people while serving them in the most compassionate, accessible, cost effective, and efficient manner; to provide outreach programs on a voluntary basis; and to educate the public with regard to the services of the office.

SURROGATE 2015 ACCOMPLISHMENTS

2015 Accomplishments

To give you a better understanding of how many clients are seen by my office on a daily basis, these are some of our figures year to date. 1-1-15 / 10-26-15

That's over 8,000 clients in a year. These are cases where the clients would be seen in our office or a satellite office. The paperwork is generated by my staff and the clerks and we all take the signatures.

Probates	1219		Administrations	733
Adoptions	80		Minor's Guard	82
Superior Court	1420		Release of Funds	68
Misc.	1740		Searches	392
Certificates	2454		Incapacities	78

Speaking Engagements

speaking engagements were conducted at social clubs and organizations throughout the county. I also addressed professional groups such as The Bar Association, Police Trainees, Local Registrars and The State Probate Judges.

In addition I have been conducting classes and seminars for the Local and State Bar Associations. The law now requires that attorneys earn continuing education credits each year. The opportunity to provide solid legal advice and discuss work product with the attendees is beneficial to everyone.

Additional Seminars conducted:

- Court Volunteers. The meeting was attended by members of the Judiciary and State representatives to model our program.
- The Superior Court asked me to co-host a seminar for the “Early Settlement Panel with Judge Dupuis.
- Court Clerks, Superior Court
- The Municipal Registrars, Union County .
- Welfare and Social Services Commission at the League of Municipalities
- Annual Adoption Day

Evening Hours

During the year we conducted over 100 evening appointments in host communities. We share services with Cranford, Union and Summit and Scotch Plains.

Home Appointments

As an addendum to Evening Hours, home appointments remained steady this year. I visited about 50 households or hospitals to take signatures on estate matters

Surrogate’s Intermingled Trust Fund

When a minor is injured or inherits money the judge or the law will require that the Surrogate set up a guardianship and hold that money in a separate trust account, we currently hold \$25,000,000.00 in assets

County Court Monitors

Union County is fortunate to have one of the finest court monitoring programs in the State. These individuals visit the incapacitated person and the guardian to check on their well being.

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2016 GOALS & OBJECTIVES

New Court Rules

The Administrative Office of the Courts has proposed changes to the Guardianship Court Rules which will mean changes for us.

Constituent Services

How can I better serve the public? I am always open to suggestions happy to bring our program to the public, several times a year.

Upgrades to Software System

With the upgrades to the software system currently taking place we now have the ability to access reports, this has expedited the process time for the clients.

Communications

I have several more brochures that I would like translated into various languages that would be available to the public.

Continuing Legal Education

It is mandated by law that attorneys continue to educate themselves on valuable information and changes in the law in order to serve their clients. I have participated as a panelist on several occasions to help educate the legal profession about changes in probate law

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Description	2015 Adopted Budget	2015 Modified Budget	2015 Expenditures	2016 Budget Request
Salaries	972,467	972,467	857,286.82	1,045,543
Other Expenses	29,880	29,880	14,528.93	33,180
Total	1,002,347	1,002,347	871,815.75	1,078,723

Request for new positions		1	100,000	Shared position with Sheriff & County Clerk
Request for promotions		3	6,000	County
Vacancies		3	171,376	County