SURROGATE

2023 Budget Presentation

2022 Accomplishments
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2022 Statistics			
Adoptions	94	Probate Matters	5,719
Certificates	13,622	Release of Funds	80
Guardianships	147	Searches	77
Incapacities	197	Withdrawal of Funds	398

- The Surrogate's Office has seen significant caseload rise since 2020 in guardianships (34%) and general probate (16%) matters, respectively.

- This year 94 adoptions were conducted through the office and collaborated with a relaunch of the November Adoption Day celebration.

- In December, the Surrogate's staff undertook a review of the financial institutions holding funds for the Surrogate's Intermingled Trust Fund (SITF). The Surrogate's Office, in partnership with the Union County Vicinage, selected five local banks locking in record high interest rates for the benefit of minors and incapacitated individuals whose funds are held in the SITF.

2023 Goals and Objectives
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- Collaborate with County Business Systems to establish an E-Probate module for the Surrogate Court's Blue Stone system. The new module will permit clients and attorneys to submit paperwork via the Surrogate website.

- Increased community presence and the launch of the Surrogate's speaking series "Setting Your Intentions".

- Collaborate with the Department of Human Services and Union County stakeholder organizations in special needs community to provide education on guardianships.

- Online appointment scheduling and establishment of a satellite office in Westfield.

- Continued progress of the digitization of Surrogate archives. In-house staff has been undertaking the conversion of microfiche records, dating back to the 1970s, in an attempt to modernize record keeping for the public to access information.

	SURROGATE			
Description	2022 Adopted Budget	2022 Modified Budget	2022 Expenditures	2023 Budget Request
Salaries & Wages	1,175,010	1,175,010	872,098.48	1,173,158
Other Expenses	30,650	30,650	30,285.78	36,200
Total	**1,205,660**	**1,205,660**	**902,384.26**	**1,209,358**
	NO NEW POSITIONS			