

TABLE OF CONTENTS

CHAPTER 1: JURISDICTIONAL AND PROCEDURAL ISSUES

| | |
|-------------------------------------------------------------------------------|----|
| I. Introduction..... | 21 |
| II. Overview of Historical Background..... | 21 |
| III. Current Rules..... | 22 |
| IV. Actions to Probate Will..... | 23 |
| V. Domicile | 28 |
| VI. Family Part - Probate Part | 32 |
| VII. Right to Jury Trial in Probate | 35 |
| VIII. Entire Controversy Doctrine, Res Judicata, and Collateral Estoppel..... | 38 |
| IX. Federal Jurisdiction | 43 |
| Form 1A: Discovery and Scheduling Order..... | 50 |

CHAPTER 2: DISPUTES AS TO PRE-DEATH CONDUCT AND ASSETS PASSING OUTSIDE A WILL

| | |
|----------------------------------------------------------------------------------------|-----|
| I. Introduction..... | 53 |
| II. Claims for Services Rendered | 53 |
| III. Contracts to Make a Will..... | 55 |
| IV. Gifts..... | 61 |
| A. The Intent Requirement | 63 |
| B. The Delivery Requirement | 64 |
| C. Specific Contexts as to Gifts..... | 65 |
| V. Powers of Attorney | 69 |
| VI. Paternity and Posthumous Children | 72 |
| VII. Dead Man's Act | 78 |
| VIII. Joint Accounts, Life Insurance, IRAs, and Beneficiary Designations | 80 |
| A. Joint and Pay-on-Death Accounts | 80 |
| B. Life Insurance, IRAs, and Beneficiary Designations..... | 85 |
| IX. Tortious Interference with Inheritance | 96 |
| A. New Jersey Precedent..... | 96 |
| B. Elements of The Cause of Action: Recognition of The Tort | 98 |
| C. Policies Supporting The Tort | 99 |
| D. The National Trends..... | 100 |
| X. Liability for Nursing Home Care..... | 102 |
| XI. The Unique Problem of Statutes of Limitations and Laches..... | 106 |
| Form 2A: Complaint to Invalidate Power of Attorney, Will, and Pre-Death Transfers..... | 111 |
| Form 2B: Complaint to Challenge Power of Attorney | 117 |
| Form 2C: Complaint to Invalidate Will and Beneficiary Designation | 128 |

CHAPTER 3:
GUARDIANSHIPS AND CONSERVATORSHIPS

| | |
|----------------------------------------------------------------------------|-----|
| I. Introduction | 135 |
| II. Guardianships: Jurisdiction and Venue | 135 |
| III. Guardianships: Procedural Issues | 138 |
| A. Standing: Who May Commence Proceeding..... | 138 |
| B. Standing: Who May Not Commence Proceeding..... | 138 |
| C. Other Procedural Issues..... | 140 |
| D. Guardianships of Minors | 145 |
| Persons Entitled to Appointment..... | 145 |
| Procedural Points; Pleadings | 145 |
| E. Guardianships of Incapacitated Persons | 147 |
| Accompanying Affidavits | 149 |
| Order for Hearing | 151 |
| Court-Appointed Counsel for The Alleged Mentally Incapacitated Person..... | 152 |
| Proof of Service and Appearances..... | 153 |
| Trial | 153 |
| Appeal..... | 157 |
| IV. Guardians: Appointments, Powers, and Duties Generally..... | 157 |
| A. Appointment; Eligibility | 157 |
| B. Conditions of Guardianship..... | 158 |
| C. General Powers and Duties..... | 159 |
| Guardians of Minors: Specific Powers and Duties | 160 |
| Guardians of Incapacitated Persons: Specific Powers and Duties | 161 |
| Sale or Transfer/Gift of Assets..... | 162 |
| Court Approval..... | 168 |
| Reports and Accountings by Guardian | 168 |
| D. Limited Guardianships | 169 |
| E. Regaining Mental Capacity..... | 170 |
| F. Change in Guardian or Termination of Guardianship | 170 |
| G. Compensation..... | 172 |
| V. Special Medical Guardians | 174 |
| A. Standards | 174 |
| B. Venue | 174 |
| C. Procedure..... | 175 |
| VI. Guardians Ad Litem | 175 |
| A. Appointment | 175 |
| B. Duties and Responsibilities | 179 |
| 1. Distinction Between Guardian Ad Litem and Guardian..... | 179 |
| 2. Distinction Between Guardian Ad Litem and Court-Appointed Counsel..... | 179 |
| C. Compensation | 180 |

| | |
|------------------------------------------------------------------------------------------------|-----|
| VII. Conservatorships | 180 |
| A. Conservatorships Versus Guardianships..... | 180 |
| B. Jurisdiction and Venue | 181 |
| C. Procedural Issues..... | 181 |
| D. Hearings..... | 182 |
| E. Conservators: Eligibility, Powers, & Duties | 182 |
| 1. Eligibility; Requirements Before Acting..... | 182 |
| 2. Bond..... | 182 |
| 3. Powers and Duties | 183 |
| 4. Conservators: Inventories & Accountings..... | 184 |
| 5. Liability | 184 |
| 6. Compensation | 185 |
| 7. Changes in conservator | 185 |
| VIII. Other Kinds of Guardians | 185 |
| A. Kinship Legal Guardians | 185 |
| B. Standby and Testamentary Guardians..... | 189 |
| IX. Contested Guardianships | 191 |
| X. Mediation Issues in Guardianship Proceedings | 192 |
| XI. The Unique Question of Immunity for Court-Appointed Guardians..... | 193 |
| Form 3A: Adult Guardianship Case Information Sheet..... | 195 |
| Form 3B: Verified Complaint to Appoint Guardian(S) of The Person and Estate (Property)..... | 197 |
| Form 3C: Verified Complaint for Declaration of Incapacity..... | 205 |
| Form 3D: Civil Action Certification of Assets | 211 |
| Form 3E: Civil Certification of Physician or Psychologist..... | 215 |
| Form 3F: Medical Certification | 218 |
| Form 3G: Cover Page Individualized Education Program..... | 221 |
| Form 3H: Order Fixing Guardianship Hearing | 223 |
| Form 3I: Order Fixing Guardianship Hearing | 226 |
| Form 3J: Judgment of Incapacity | 230 |
| Form 3K: Judgment Declaring Incapacity | 235 |
| Form 3L: Judgment of Legal Incapacity and Appointing a Guardian of The Person and Estate | 239 |
| Form 3M: Notice of Hearing | 244 |
| Form 3N: Sample Report of Counsel..... | 247 |

CHAPTER 4: **DISPUTES REGARDING THE VALIDITY AND INTERPRETATION OF WILLS**

| | |
|------------------------------------------------------------------------------------------------------------------|-----|
| I. Introduction..... | 253 |
| II. Initial Considerations: | |
| Venue; Intestacy; Will Registry; Standing; Procedural Issues; Administration of Estate; Pre-Death Contests | 253 |
| A. Venue | 253 |
| B. Intestacy (Including Potential Forfeiture of Right to Inherit)..... | 253 |
| C. Will Registry | 262 |

| | |
|-----------------------------------------------------------------------------------------------|-----|
| D. Standing | 262 |
| E. Procedural Issues | 264 |
| F. Other Issues as to Administration of Estate; | |
| Appointment of Temporary Administrators; Wills Naming Counsel for Estate..... | 268 |
| G. Pre-Death Will Contests | 268 |
| III. Grounds to Contest a Will..... | 269 |
| A. Noncompliance with Formalities | 270 |
| B. Revocation..... | 295 |
| C. Lack of Capacity | 299 |
| D. Insane Delusion | 311 |
| E. Fraud | 312 |
| F. Forgery..... | 312 |
| G. Mistake | 313 |
| IV. Undue Influence..... | 314 |
| A. Burden of Proof of Undue Influence | 320 |
| B. Presumption of Undue Influence | 320 |
| C. Rebutting a Presumption of Undue Influence..... | 325 |
| V. Disputes as to Construction | 334 |
| A. Doctrine of Probable Intent..... | 334 |
| B. Reformation | 355 |
| C. Applications for Advice and Direction | 356 |
| VI. In Terrorem Clauses | 356 |
| VII. Appellate Standards | 362 |
| Form 4A: Caveat | 363 |
| Form 4B: Withdrawal of Caveat..... | 364 |
| Form 4C: Complaint for Probate of Will Despite Caveat and to Enforce in Terrorem Clause | 365 |
| Form 4D: Complaint to Set Aside Will as Revoked..... | 370 |
| Form 4E: Complaint to Invalidate Will as Invalid..... | 376 |
| Form 4F: Complaint to Invalidate Will and Asset Transfers | 385 |

CHAPTER 5: TRUST DISPUTES

| | |
|-------------------------------------------------------------------------------------------------------|-----|
| I. Introduction | 393 |
| II. General Effect — and What Is Not Changed by The NJ UTC | 394 |
| III. The General Provisions and Definitions of The NJ UTC (Article 1), | |
| Including The Provisions on Representation (Article 2) and Miscellaneous Provisions (Article 9) | 395 |
| A. General Provisions and Definitions | 395 |
| B. Trust Terms Prevail | 395 |
| C. Notice | 396 |
| D. Nonjudicial Settlement Agreements | 396 |
| E. Representation | 397 |

| | |
|----------------------------------------------------------------------------------------------------------------|-----|
| F. Article 9: Miscellaneous Provisions | 398 |
| IV. Creation of Trusts, Including Whether a Valid Trust Exists | 398 |
| A. Basic Requirements to Create a Trust..... | 398 |
| B. Capacity to Create a Trust | 401 |
| C. Fraud, Duress, and Undue Influence in Trust Creation..... | 402 |
| D. Deadlines to Contest The Validity of a Trust..... | 402 |
| V. Constructive Trusts | 403 |
| VI. Reformation, Modification, Interpretation, Revocation, and Termination of Trusts | 411 |
| A. Reformation, Modification and Termination: NJ UTC | 411 |
| B. Reformation, Modification, and Termination of Trust: New Jersey Common Law..... | 417 |
| C. New Jersey Common Law and Judicial Proceedings: Other Issues of Importance | 422 |
| D. Disputes as to The Identity of Beneficiaries | 423 |
| VII. Probable Intent as to Trusts | 429 |
| VIII. Creditor's Claims and Spendthrift and Discretionary Trusts | 442 |
| A. Spendthrift Provisions | 442 |
| B. Important Distinction Between UTC and NJ UTC | 443 |
| C. Special Needs Trusts..... | 443 |
| D. Discretionary Trusts..... | 443 |
| E. Creditor's Claims Against Settlor | 444 |
| F. Overdue Distributions..... | 444 |
| G. Personal Obligations of The Trustee..... | 445 |
| IX. Revocable Trusts | 445 |
| X. The Office of The Trustee, and The Duties and Powers of The Trustee | 446 |
| XI. Duties, Defenses, and Liabilities of Trustees, Including Limitations of Actions for Trustee Liability..... | 449 |
| A. Basic Duties of Trustees for Which Claims for Breach of Trust May Arise..... | 449 |
| B. Trustee Defenses to Claims of Breach of Trust..... | 457 |
| C. Remedies and Damages for Breach of Trust..... | 467 |
| D. The Duty to Disclose..... | 468 |
| XII. Directed Trusts | 470 |
| XIII. Trust Protectors | 471 |
| XIV. Decanting of Trusts..... | 473 |
| XV. Special Needs Trusts | 475 |
| XVI. Secret Trusts | 481 |
| XVII. Trust Assets and Divorce Proceedings..... | 482 |
| XVIII. Jurisdiction and Venue | 490 |
| A. NJ UTC | 490 |
| B. New Jersey Common Law and Court Rules | 491 |
| Form 5A: Complaint as to Trust for Construction, Advice and Direction..... | 495 |

CHAPTER 6:
SPOUSAL RIGHTS IN PROBATE LITIGATION

| | |
|------------------------------------------------------------------------------|-----|
| I. Introduction | 503 |
| II. Intestacy in General: Spousal Rights..... | 506 |
| Spousal Rights Regarding Decedents Dying Before February 27, 2005 | 506 |
| Spousal Rights Regarding Decedents Dying on or After February 27, 2005 | 507 |
| III. Omitted Spouse | 509 |
| Spousal Rights Regarding Decedents Dying Before February 27, 2005 | 509 |
| Spousal Rights Regarding Decedents Dying on or After February 27, 2005 | 510 |
| IV. Elective Share..... | 512 |
| Introduction and Background..... | 512 |
| Requirements..... | 515 |
| Qualification as Surviving Spouse..... | 516 |
| Common Law Marriage..... | 516 |
| Waiver of Elective Share..... | 518 |
| Claiming The Elective Share | 519 |
| Calculation of The Elective Share..... | 527 |
| Elective Share Calculation Worksheet | 530 |
| V. Estate and Trust Disputes During Divorce Proceedings | 534 |
| A. Death During Divorce Proceedings..... | 535 |
| B. Impact of Trusts in Divorce | 541 |
| C. Trusts and Divorce: Other Jurisdictions..... | 545 |
| D. Impact of Divorce on Estate Disputes More Generally..... | 553 |
| E. Abandonment of Child and Potential Bar to Inheritance Under Statute..... | 556 |
| VI. Palimony | 559 |
| VII. Death Tax Apportionment..... | 566 |
| VIII. Spousal Claims as to Retirement Funds and Similar Assets..... | 567 |
| IX. Dower and Curtesy..... | 569 |
| Background | 569 |
| Nature of Dower and Curtesy Interests — Inchoate Versus Consummate..... | 570 |
| Assignment of Dower and Curtesy Rights | 570 |
| When Dower and Curtesy Rights are Barred or Released..... | 571 |
| Principal Matrimonial Residence Acquired on or After May 28, 1980 | 572 |
| Dower and Curtesy Rights as to Real Property Held in Trust | 573 |
| Dower and Curtesy Rights With Respect to Mortgaged Property..... | 573 |
| Quarantine | 573 |
| Form 6A: Complaint to Assert Elective Share..... | 575 |
| Form 6B: Complaint by Omitted Spouse..... | 580 |

CHAPTER 7:
CLAIMS BY AND AGAINST FIDUCIARIES

| | |
|---------------------------------------------------------------------------------|-----|
| I. Introduction..... | 585 |
| II. Claims Between and Among Fiduciaries Themselves | 585 |
| Removal of Fiduciaries | 585 |
| Recovery of Assets from Another Fiduciary | 586 |
| Disagreement Among Three or More Fiduciaries | 586 |
| III. Claims by Fiduciaries | 587 |
| Applications for Advice and Direction..... | 587 |
| Actions to Preserve or Protect The Estate | 588 |
| Insolvent Estates..... | 588 |
| Action by Fiduciary for His Own Discharge..... | 591 |
| Claims Related to The Death of The Decedent..... | 592 |
| 1. Wrongful Death Actions, n.j.s.a. §§ 2a:31-1 to -6 (Wrongful Death Act) | 592 |
| 2. Survival Actions n.j.s.a. § 2a:15-3 | 593 |
| 3. Distinction Between Wrongful Death and Survival Actions..... | 594 |
| IV. Claims Against Fiduciaries by Beneficiaries or Third Parties..... | 595 |
| Actions by Beneficiaries Against Fiduciaries | 595 |
| 1. Breach of Fiduciary Duty..... | 596 |
| 2. Voidable Transactions | 601 |
| 3. Removal of Fiduciary | 602 |
| 4. Issues as to Incomplete or Lost Records | 604 |
| 5. Actions Against Sureties | 604 |
| Actions by Third Parties Against Fiduciaries | 607 |
| 1. Priority of Claims | 607 |
| 2. Timing Considerations | 609 |
| 3. Uniform Fraudulent Transfer Act (N.J.S.A. § 25:2-20 Et Seq.)..... | 613 |
| 4. Environmental Issues | 614 |
| 5. Impact of Escheat | 617 |
| Actions by Third Parties Against The Beneficiaries..... | 618 |
| Common Defenses of Fiduciaries | 619 |
| Form 7A: Complaint by Fiduciary for Advice and Direction | 626 |
| Form 7B: Complaint for Advice and Direction | 632 |
| Form 7C: Complaint to Remove Fiduciary and Compel Accounting | 639 |

CHAPTER 8:
FIDUCIARY ACCOUNTINGS

| | |
|-------------------------------------------|-----|
| I. Introduction..... | 647 |
| II. Fiduciary Accountings Generally | 647 |
| III. Timing of Accountings | 649 |
| IV. Inventories..... | 650 |

| | |
|------------------------------------------------------------------------------|-----|
| V. Maintenance and Retention of Records | 651 |
| General Standards..... | 651 |
| Issues as to Incomplete or Lost Records..... | 652 |
| VI. Form of Account | 655 |
| Form of Account | 656 |
| Statement to be Annexed to Account | 656 |
| VII. Pleadings and Procedural Issues for Accounting Actions..... | 656 |
| VIII. Notice Issues in Accounting Actions | 659 |
| Persons in Interest..... | 659 |
| Attorney General | 660 |
| Surety..... | 660 |
| Guardian ad Litem..... | 660 |
| Virtual Representative..... | 661 |
| IX. Audit of Account by Surrogate | 662 |
| X. Exceptions to Account..... | 663 |
| General Rules..... | 663 |
| Exceptions Regarding Breach of Duty | 667 |
| Exceptions Regarding Investments and Diversification | 669 |
| 1. Background | 669 |
| 2. Prudent Investor Act | 669 |
| 3. Discretionary Principal Distributions by a Trustee | 672 |
| 4. Sample Decisions as to Diversification | 674 |
| 5. Uniform Principal and Income Act..... | 681 |
| XI. Hearings on Fiduciary Accountings..... | 684 |
| XII. Damages, Remedies, and Sanctions | 688 |
| Removal of The Fiduciary..... | 691 |
| Money Damages | 693 |
| Forfeiture of Commissions..... | 694 |
| 1. Forfeiture of Commissions: General Standards Allowing Or Disallowing..... | 694 |
| 2. Forfeiture of Commissions: Misappropriation or Conversion..... | 696 |
| 3. Forfeiture of Commissions: Failure to Invest..... | 696 |
| 4. Forfeiture of Commissions: Failure to Account | 696 |
| 5. Forfeiture of Commissions: Incorrect or Incomplete Accounts..... | 697 |
| 6. Forfeiture of Commissions: Allowances..... | 697 |
| Other Sanctions | 697 |
| XIII. Bonds and Sureties..... | 698 |
| Form 8A: Order to Show Cause..... | 700 |
| Form 8B: Complaint for Settlement of Intermediate Account (Trust)..... | 705 |
| Form 8C: Complaint for Settlement of Final Account (Trust) | 711 |
| Form 8D: Proof of Service for Complaint for Settlement of Account | 716 |
| Form 8E: Order Approving Account | 718 |
| Form 8F: Sample Accountings | 720 |

| | |
|---------------------------------------------|-----|
| Form 8G: Exceptions..... | 737 |
| Form 8H: Sample Accounting - Guardian | 739 |

CHAPTER 9:
FIDUCIARY AND ATTORNEY COMPENSATION AND SANCTIONS

| | |
|-----------------------------------------------------------------------|-----|
| I. Introduction..... | 769 |
| II. Fiduciary Compensation — Commissions..... | 769 |
| General Standards | 769 |
| Key Statutes..... | 770 |
| More Than One Fiduciary..... | 772 |
| Rules of Court | 772 |
| Forfeiture of Commissions..... | 773 |
| Potential Waiver of Commissions | 774 |
| III. Attorney Compensation — Counsel Fees and Costs | 775 |
| Counsel Fees: General Standards | 775 |
| 1. Fund in Court..... | 776 |
| 2. "Probate Actions"..... | 784 |
| Counsel Fees: Awards Against Adverse Parties or Counsel | 791 |
| 1. Parties' Conduct | 791 |
| 2. Offer of Judgment | 797 |
| 3. Sanctions | 802 |
| Counsel Fees: Procedural Requirements and Issues | 813 |
| Counsel Fees: Timing Factors | 814 |
| Counsel Fees: Application in Specific Cases..... | 815 |
| Counsel Fee Applications: The Treatment of Costs | 816 |
| Counsel Fees: Fees and Costs Incurred in Fee Application Itself | 816 |
| Form 9A: Affidavit of Attorney Services..... | 817 |
| Form 9B: Affidavit of Fiduciary Services Regarding Commissions | 820 |

CHAPTER 10:
DISPUTES AS TO CHARITABLE TRANSFERS

| | |
|----------------------------------------------------------------|-----|
| I. Introduction..... | 822 |
| II. Role of Attorney General..... | 822 |
| III. Disputes as to Construction and Implementation | 824 |
| Whether a Charitable Trust or Bequest Exists..... | 824 |
| Cy Pres Doctrine: Fundamental Principles and Cases..... | 825 |
| Cy Pres Doctrine: More Recent Cases..... | 828 |
| Doctrine of Deviation..... | 834 |
| Conditional Bequests..... | 836 |
| Doctrine of Probable Intent..... | 839 |
| Impact of Pledge Agreements..... | 845 |
| IV. Uniform Prudent Management of Institutional Funds Act..... | 846 |

| | |
|------------------------------------------------------|-----|
| Introduction | 846 |
| Upmifa Versus Umifa | 846 |
| “Institutional Funds” and Other Defining Terms | 848 |
| Standing Under Upmifa..... | 851 |
| Form 10A: Complaint for Cy Pres Relief..... | 853 |
| Form 10B: Complaint for Relief Under Upmifa | 859 |

CHAPTER 11:
LEGAL MALPRACTICE AND SIMILAR CLAIMS

| | |
|----------------------------------------------------------------------------------------------------------------|-----|
| I. Introduction | 866 |
| New Jersey Trends | 867 |
| National Trends | 893 |
| 1. Causes of Action by Beneficiaries | 893 |
| 2. Specific Claims | 894 |
| Similar Claims Against Other Professionals..... | 896 |
| 1. Merrick v. Mercantile-Safe Deposit & Trust Co., 855 F.2d 1095 (4th Cir. 1988)..... | 896 |
| 2. In the Matter of McCoy, 419 N.W.2d 301 (Wis. Ct. App. 1987), review denied, 422 N.W.2d 860 (Wis. 1988)..... | 897 |
| 3. Roeske v. First Nat'l Bank of Lake Forest, 413 N.E.2d 476 (Ill. App. Ct. 1980), | 897 |

CHAPTER 12:
SETTLEMENT OF PROBATE LITIGATION

| | |
|-------------------------------------------------------------------------------------|-----|
| I. Introduction | 898 |
| II. Benefits to Settlement | 898 |
| III. Hurdles to Settlement | 899 |
| IV. The Settlement Terms and Agreement | 899 |
| The Settlement: Factors to Consider..... | 899 |
| The Settlement Agreement: The Need and Prudence of a Writing..... | 908 |
| The Settlement Agreement: Sample Terms..... | 909 |
| 1. Releases..... | 909 |
| 2. Accountings | 911 |
| 3. Representation of Interests | 911 |
| 4. Indemnification..... | 913 |
| 5. Tax Allocation and Intended Tax Consequences | 913 |
| V. Additional Sample Decisions Regarding Settlement..... | 914 |
| VI. Mediation and Alternative Dispute Resolution (Adr): Select Considerations | 920 |
| Advantages of Adr/Mediation | 920 |
| Disadvantages of Adr/Mediation | 921 |
| The Modern Trends | 921 |
| Whether a Will or Trust Can Require Adr/Mediation | 922 |
| The Mediation-Communication Privilege..... | 928 |
| Form 12A: Sample Settlement Agreement | 930 |

CHAPTER 13:
MISCELLANEOUS CONCERNS IN PROBATE LITIGATION

| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| I. Introduction..... | 936 |
| II. Disputes as to Administration of The Estate..... | 936 |
| III. Disputes as to Burial and Disinterment..... | 938 |
| IV. Attorney-Client Privilege..... | 954 |
| A. Who is The Client? | 956 |
| B. Defining The Scope of Attorney-Client Relationship..... | 956 |
| C. Majority Rule: Fiduciary Only as Client | 957 |
| D. Minority View — Beneficiary of Estate or Trust as Client..... | 958 |
| E. The Potential Erosion of The Privilege | 958 |
| V. Unauthorized practice of Law..... | 961 |
| A. Preparation, Drafting, or Execution of a Will or Other Estate Planning Activities by A Layperson..... | 962 |
| B. Bad Faith or Fraudulent Violations in The Unauthorized Practice of Law and The Statutory Duty on Financial Institutions to Report Fraud | 962 |
| 1. In Re Baker, 8 N.J. 321 (1951). | 962 |
| 2. Lucca V. Wells Fargo Bank, N.A., 441 N.J. Super. 301 (Law Div. 2015). | 962 |
| 3. Wolens V. Morgan Stanley Smith Barney, Llc, 449 N.J. Super. 1 (App. Div. 2017). | 963 |
| C. Estate Planning by Attorney Not Admitted in New Jersey | 965 |
| D. Paralegals and Trust/Marketing Companies | 966 |
| E. Will Kits, “Do-It-Yourself” Books, Forms, and Interactive Software..... | 967 |
| VI. Immunity of Court-Appointed Counsel | 967 |
| A. National Trends | 968 |
| B. New Jersey..... | 969 |
| C. Conclusion | 971 |
| VII. Elder Abuse..... | 971 |

TABLE OF AUTHORITIES

| | |
|---------------------------|------|
| TABLE OF AUTHORITIES..... | 973 |
| CASES..... | 973 |
| STATUTES..... | 1010 |
| OTHER STATUTES..... | 1025 |
| REGULATIONS..... | 1026 |
| RULES..... | 1027 |
| OTHER AUTHORITIES..... | 1031 |