Rutgers Law School
Institute for Professional Education

CLE Program Announcement
rutgerscle.com

Essentials of Estate Planning and Drafting

Thursday, December 3, 2026

6:00 p.m. – 8:30 p.m. (Eastern time)

Center for Law and Justice

Rutgers Law School, 123 Washington Street, Newark, NJ 07102
and Zoom

This program will introduce the attorney to the estate planning process, including the drafting of wills, trusts, durable powers of attorney, living wills with designation of health care proxy, beneficiary designations and related documents. The attorney will be guided from the initial client interview, through the drafting of the various estate planning documents and to their execution. Tax aspects of estate planning will also be discussed, including New Jersey inheritance taxes, and U.S. generation-skipping, gift and estate taxes. While the general focus will be on New Jersey law, many of the fundamentals discussed will apply to many other jurisdictions. Questions will be allowed at any time during the seminar. Sample forms will be provided.

Speaker

Brian M. Balduzzi, Esq., Tax LL.M., MBA, CFP®, CEPA®, AEP®, IPA
Partner
Holland & Knight LLP

CLE Credit: NJ: 3.0 | NY: 3.0 | PA: 2.5
Qualifies for New Jersey newly admitted credit.
See page 2 for CLE details.

CLE registration fee: $75

Register at rutgerscle.com

CLE INFORMATION

Rutgers Law School is an approved New Jersey (418) and Pennsylvania (824) continuing legal education provider. In addition, this program qualifies for New York CLE credit pursuant to the Approved Jurisdiction policy. If you are seeking CLE credit, you must attend, complete an attendance form and evaluation, and have paid the applicable CLE fee.

NJ CLE Information: This program has been approved by the Board on Continuing Legal Education of the Supreme Court of New Jersey for 3.0 hours of total CLE credit. Of these, 3.0 qualify as hours of total credit for the newly admitted category, basic estate planning.

NY CLE Information: This transitional continuing legal education program qualifies for a maximum of 3.0 credit hours, of which 3.0 credit hours can be applied toward the Areas of Professional Practice requirement. New York attorneys must view the entire program or an entire panel to receive CLE credit.

PA CLE Information: This program has been approved by the Pennsylvania Continuing Legal Education Board for 2.5 hours of substantive law, practice, and procedure CLE credit.

Other Jurisdictions: Rutgers Law School does not seek direct accreditation of live programs or webinars in other states. However, many states allow attorneys to earn credit through reciprocity or self-submission. Attorneys must research CLE rules and request accreditation from their respective states. Rutgers Law School will provide proof of attendance.

Format: Faculty in room with participants, or Zoom webinar, fully interactive, verifiable, live, simultaneous, synchronous transmission. Questions are allowed during the program.

Degree of Difficulty: All levels.

Attendance Reporting: Zoom attendees must keep track of CLE codes shared at random intervals, which are needed to complete the attendance and evaluation form provided at the end of the program or upon request to ipe@law.rutgers.edu. Attendees must submit the form for CLE credit.

In-person attendees must sign in upon arrival and take an attendance form and evaluation. Upon departure, they must certify their attendance and return the completed form.

Rutgers Law School will email certificates of attendance for New Jersey and New York attorneys and submit attendance for Pennsylvania attorneys within 30 days of the program, if the CLE requirements have been met.

CLE Materials: Thorough, high-quality, and carefully written materials shall be distributed to all attendees electronically before or at the program.

Accessibility: We strive to make our programs accessible to all registrants. Contact us if you have an accessibility need or encounter any issues while attending our events at ipe@law.rutgers.edu or at 973-353-5928.

Cancellation Policy: Cancellation notices must be received by email to ipe@law.rutgers.edu at least 24 hours before the program to qualify for a refund, less a $5 administrative fee, or full credit toward another program within a year of the program date. There are no refunds after this time except for extraordinary circumstances as determined by the director or program coordinators. Substitutions are accepted.

Financial Aid Policy: We are strongly committed to professional development and seek to make our programs affordable to attorneys. If possible, we will provide reduced tuition, tuition waiver or scholarship to attorneys who demonstrate financial hardship. Requests should be made prior to the program date by email to ipe@law.rutgers.edu.