## THE BARROW IN TH

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PUBLISHED BY THE CAMDEN COUNTY BAR ASSOCIATION

**VOL. 72, NO. 8 • APRIL 2024** 

THE CAMDEN COUNTY BAR FOUNDATION PRESENTS

## LAWYERS GOT TALENT TOO

Join friends and colleagues from the Bench and Bar for a very special FUNdraising event – Lawyers Got Talent Too – on Thursday, April 25 at American Legion Post 371 in Gibbsboro. Our all-star lineup includes vocal, instrumental and comedic acts from some of South Jersey's most talented attorneys. Special guest judges include Zech McPhearson of the Philadelphia Eagles and Hon. Stephen Holden formerly of the Dovells! Enjoy wine, beer and soft drinks, delicious food and a wonderful evening of entertainment and some friendly competition as we raise money for the Foundation's upcoming Children's Picnic.

Emceed by the Association's own "MVP" Matthew V. Portella, acts include:

David Anderson Nancianne Aydelotte Theodore Baker Jeanette Cartwright Fran Kasen Joe Lombardo Jill Tribulas

Various sponsorship packages are available and include tickets to the event, signage and mention at event, 50/50 raffle tickets and more. Check out the fliers included in this issue. See you there!

CAMDEN COUNTY BAR ASSOCIATION

## COCKTAILS & CONVERSATION RETURNS! MORE INFORMATION ON PAGE 14

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## SAVE THE DATE! INSTALLATION DINNER

honoring

Matthew T. Rooney

AS THE 98TH PRESIDENT OF THE CAMDEN COUNTY BAR ASSOCIATION

JUNE 13, 2024

CAMDEN COUNTY BOATHOUSE

Save the date of **June 13, 2024** for the annual Installation of Officers Dinner as we install **Matthew T. Rooney** as the 98th president of the Camden County Bar Association, and **Rachael B. Brekke** as the president of the Camden County Bar Foundation, as well as the officers and trustees of the Association and Foundation. The special event will take place at the Camden County Boathouse.

Stay tuned for details!

#### Advertise at the 2024 Installation Dinner!

See Page 2 for more details.

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#### Advertise at the 2024 **Installation Dinner!**

Help support the Bar Foundation's community service projects.

This year's annual Installation of Officers Dinner will take place on Thursday, June 13 at the Camden County Boathouse in Pennsauken, NJ. Celebrating 143 years of service to the profession and community, the event will feature a cocktail hour with hors d'oeuvres and delicious dinner, along with music and program installing the new Officers and Trustees of the Association & Foundation.

Show your support as Matthew T. Rooney is installed as the Association's 98th President, and Rachael B. Brekke is installed as President of the Camden County Bar Foundation.

Pay tribute to Matt and Rachael, and the other incoming officers and trustees and thank them for the time and effort they give to both organizations by placing an ad to be featured on a loop on a screen at the Installation Dinner on June 13. Proceeds from the event and advertising support the Bar Foundation's many community service projects that improve the quality of life for local residents, such as parties and picnics for underserved children in Camden, scholarship awards for a graduating senior at each of Camden County's high schools, scholarship awards for deserving law students, and much more!

Use the ad reservation form in this month's issue to reserve a display ad for your firm or place your own personal ad. Ads must be received at Bar Headquarters no later than Friday, June 7 to be included.

Hope to see you there!

#### THE DOCKET (APR 2024

Thursday, April 18

Devine Award Reception honoring John B. Kearney 6 p.m. - II Villagio, Cherry Hill

Thursday, April 25

**Lawyers Got Talent Too** 6 p.m. - American Legion Post 371, Gibbsboro

Monday. April 29,

All-You-Can-CLE Seminar-via Zoom

Tentative Agenda for **April Board Meeting** 

A tentative agenda for this month's regular Board of Trustees meeting follows. The meeting will begin at 4:30 p.m. and will be a hybrid meeting via Zoom and at Bar Headquarters. All meetings are open to the membership. Anyone interested in participating should notify and confirm their attendance by calling Bar Headquarters at (856) 482-0620.

- I. Call to Order
- II. Approval of Minutes from Meeting
- Treasurer's Report
- IV. President's Report
- V. Executive Director's Report
- VI. Committee Reports
  - a. Membership Committee
  - b. Young Lawyers Committee
  - c. Standing Committee Reports
- VII. Foundation Update
- VIII. NJSBA Update
- Old Business (if any)
- New Business (if any)
- XI. Adjournment

#### THE BARRISTER

Published monthly, except July and August, by the Camden County Bar Association.

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#### PRESIDENT'S PERSPECTIVE

By Matt Rooney

All members are guests are cordially invited to join me at the Annual Installation of Officers Dinner on Thursday, June 13 at the Camden County Boathouse as I am installed as the 98th President of the Camden

County Bar Association. Being installed alongside me will be Rachael Brekke as she assumes the office of President of the Camden County Bar Foundation, succeeding Dawnn Briddell who has been a fantastic leader and steward of the Foundation's community service projects. Also being installed that evening will be a dedicated and talented group of attorneys who will assume their roles as Officers and Trustees of the Association and Foundation.

The Installation Dinner is important not just because it kicks of the Bar's new fiscal year, but also because it is a major fundraiser for the Camden County Bar Foundation. Past events have raised well over \$20,000 for the Foundation's community service projects and, with the generous support of our members, we can reach or beat that goal this year. Most of you know the good work the

Foundation does each year, but few realize the impact and importance of continuing to raise money to fund these projects. The Foundation's events provide underserved children in Camden, New Jersey with picnics, holiday parties, Easter and Halloween parties, and awards thousands of dollars to deserving high school and law school students, to name a few. Without fundraisers like the Installation Dinner the Foundation simply wouldn't be able to continue its rich tradition of service to the community.

Now that I've stepped on Dawnn's toes a little by talking about our charitable arm, I'll give you another reason to attend the Installation Dinner: it's going to be a great party! Cocktails, hors d'oeuvres, dinner, live music, dancing (per my wife), signature cocktails, whiskey tastings, and a fantastic venue are all on the agenda. Please join me and my friends and colleagues at the Camden County Boathouse as we celebrate a new year and continued success.

I hope to see you there!

#### **WELCOME NEW MEMBERS**

#### APPROVED BY CCBA BOARD

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Camden County Prosecutor's Office 200 Federal Street Camden, NJ 08103

#### Roxanna Martinez, Esq.

Camden County Prosecutor's Office 200 Federal Street Camden, NJ 08103

#### **Limited Student (4)**

Elena Cruz Lauren Dempsey Kate Isidro Byron Mitchell

#### FOUNDATION UPDATE



## Earthquakes, Eclipses, and Entertainers: A Spring to Remember with the CCBF

By Dawnn E. Briddell

April showers bring May flowers! Ain't that the truth! And flooded basements! Washed out roads! One hour less sleep! And did you feel that earthquake at 10:24 a.m. on April 5????? What a spring this has been so far!!! But we also have so much to look forward to and be thankful for. We

celebrated Easter with the children of the Anna Sample House on Saturday, March 23. The children enjoyed pizza, crafts, face painting, and, of course, an Easter Egg Hunt!!!!! Everyone had a good time. "Thank you" to everyone who participated in and supported this wonderful event. Don't forget the upcoming Total Solar Eclipse on Monday, April 8, 2024. This will be the last total solar eclipse viewable from the contiguous United States until August 23, 2044! If you need to get protective eyewear, try area stores like Lowe's (starting as low as \$2.48!!).

And how about our Lawyers Got Talent 2 rising up on Thursday, April 25 at the Gibbsboro American Legion Post 371! Showtime starts at 6:00 p.m. Come out and enjoy the food, beer, wine, a fun-filled evening of entertainment, and much more!!! This will be our biggest and last fundraiser for the 2023-2024 term, so we want our CCBF family and friends to turn out! Please check out the fliers in The Barrister. Sponsorship levels ranging from \$200 to \$500 are available. Come out and support our own amazing local talent! Enjoy the vocal stylings of David Anderson, Nancianne Aydelotte, and Jeanette Cartwright, music from Theodore Baker, and Joe Lombardo, and comic

relief from Fran Kasen and Jill Tribulas!!!!! Be awed and starstruck by our special guest judges, the Hon. Stephen Holden formerly of The Dovells and Cornerback Zech McPhearson of the Philadelphia Eagles!!!! Special thanks go out to the Spring Fundraiser Committee, Co-chair Matthew Portalla, Co-chair Nancianne Aydelotte, Hon. Stephen Holden, Jim Hamilton, CCBF President Dawnn Briddell, and our Executive Director, Kara Edens. Don't miss out on this second in a lifetime opportunity!! We'd hate to miss your face in that place!!!!

And last, but by no means least, please save the date of Thursday, June 13 for the annual Installation of Officers Dinner at the Camden County Boathouse where Matthew T. Rooney will be installed as the President of the Camden County Bar Association and Rachael B. Brekke will be installed as President of the Camden County Bar Foundation, as well as the other officers and trustees of the Association & Foundation. The CCBF looks forward to the upcoming Installation! Stay tuned for more information through The Barrister.

And, keep an eye out for The Barrister for monthly updates on events for the Foundation as well as the CCBA. More information will be sent out about future events planned for the upcoming months! We hope you will find something to inspire you to join us, participate in our events, and contribute to our fundraisers with your time, talent, or treasure.

"Thoughts become words. Words become actions. We should create value with our thoughts and actions for the highest good of all concerned."

#### **VERDICTS IN THE COURT — MARCH 2024**

#### **SUPERIOR COURT OF NEW JERSEY**

VERDICT: LIABILITY
Case Type: AUTO NEG
Judge: JUDITH S. CHARNY, J.S.C.
Plaintiff's Atty: SALOMAO NASCIMENTO, ESQ.
Defendant's Atty: JEFFREY J. CZUBA, ESQ.
L-1896-20 IURY

VERDICT:LIABILITYCase Type:MEDICAL MALPRACTICEJudge:JUDITH S. CHARNY, J.S.C.Plaintiff's Atty:STEVEN WIGRIZER, ESQ.Defendant's Atty:MICHAEL HERON, ESQ.L-2856-18JURY

VERDICT: NO CAUSE
Case Type: AUTO
Judge: JOHN S. KENNEDY, J.S.C.
Plaintiff's Atty: MARK C. DEWLAND, ESQ.
Defendant's Atty: DALAL KUMLAVAGE, ESQ.
L-3155-21 IURY

#### VERDICT: LIABILITY – 100% DEFENDANT

Case Type: 603 AUTO NEG-TORT Judge: STEVEN J. POLANSKY, P.J.Cv.

Plaintiff's Atty: LEANDRA KING, pro se Defendant's Atty: HARRY C. BURTON, IV, pro

L-84-22 BENCH

VERDICT: LIABILITY-100% DEFENDANT

Case Type: CONTRACT/COMMERCIAL TRANSACTION

Judge: JOHN S. KENNEDY, J.S.C.
Plaintiff's Atty: LANIQUE A. ROBERTS,
ESO.

Defendant's Atty: JOHN A. CALZARETTO,

ESQ. L-860-23 IURY

VERDICT: LIABILITY-100% DEFENDANT

Case Type: INVERSE CONDEMNATION
Judge: MICHAEL J. KASSEL, J.S.C.
Plaintiff's Atty: ROBERT SOKOLOVE, ESQ.
& JENNIFER HILLER, ESQ.

Defendant's Atty:JOSHUA LOCKE, ESQ. & ROBERT GILLISPIE, ESQ.

L-1918-20 JURY

#### South Jersey Boutique Estate and Elder Law Firm In Search of Associate Attorney

**Fendrick Morgan, LLC**, is a boutique estate planning, elder law and estate administration firm located in Cherry Hill, New Jersey and we are looking to grow our team. This unique position, in a coveted practice area, comes with the promise of excellent mentorship and opportunities for professional growth.

Compensation is competitive and commensurate with experience. Benefits package available.

A successful candidate will have the following qualifications:

- 2-5 years of experience in the areas of estate planning, estate administration and/or elder law fields.
- New Jersey Bar admission a must.
- Pennsylvania Bar admission is preferred, but not required.
- Willing and able to be in-office full-time (remote option not available).
- Strong academic credentials.
- Excellent written and oral communication skills.
- Strong interpersonal skills, collaborative approach to work, detail-oriented and self-motivated.
- LL.M. in Taxation is preferred, but not required.

If interested, please email a cover letter, resume, and law school transcript to **Doug Fendrick** at *dfendrick fendrickmorganlaw.com* and **Jamie Morgan** at *jmorgan@fendrickmorganlaw.com*.





#### Options for Handling Funds of a Personal Injury Plaintiff who is a Minor Child or an Incapacitated Adult

by Thomas D. Begley, Jr., Esq., CELA and Emily M. Schurr, Esq.

If a personal injury plaintiff receives an award or a settlement but is a minor child or an incapacitated adult, there are essentially five choices for handling the funds. These are: (1) deposit the funds in a Trust with a corporate Trustee, (2) place the funds in a Trust

with a family member Trustee, (3) leave the money in the Surrogate's Court, (4) in the case of an incapacitated adult, leave the money with that individual's Guardian, or (5) in the case of a minor, purchase a Structured Settlement Annuity. Because the plaintiff is a minor child or incapacitated adult, the option to receive the funds outright is not available. There are a number of considerations with respect to each of these options:

- ➤ Investment Results. Most professional trustees report average investment returns in a balanced portfolio in the range of 7% per year over a 20-year period. Investment returns on trusts managed by a family member are less certain. Most family members do not have the same level of investment expertise as a professional trustee. If the money is left with the Surrogate's Court, those funds are invested in Certificates of Deposit, so typically the return is significantly less than a well-managed portfolio by a professional trustee. If the funds are managed by a Guardian, then the investment results may be uncertain depending on the investment expertise of the Guardian. Typically, the Guardians are parents or other family members who are not professional money managers. Investment returns on a Structured Settlement Annuity will depend on the interest rate environment at the time the Structure is purchased.
- ➤ *Inflation Protection.* For many personal injury victims, the recovery is a very significant asset. There should always be a discussion of how long the client wants the recovery to last. If the recovery is significant and the client wants the money to last a long period of time, inflation is a factor that must be considered. Where there is a corporate trustee, investments can be tailored to increase with

inflation. The same is true of a well-managed trust with a family trustee. With the Surrogate, inflation protection is limited because investments tend to be with Certificates of Deposit (CD) with fixed income rates. There may be some inflation protection as the CDs are rolled over. With a Guardian, inflation protection is uncertain, because it depends on the investment ability of the Guardian. Most Structured Settlements do not contain annual increases, because to do so reduces the amount of the payments in the early years. Most Structured Settlements do not offer protection against inflation.

- ➤ Bond. A big consideration is a bond. Normally in these situations, a bond is required unless waived by the court. A court almost always waives a bond if there is a trust managed by a professional trustee. If there is a trust managed by a family trustee, courts almost always require the trustee to post a bond. Many individuals trying to serve as trustee do not qualify financially for a bond. If the money is left with the Surrogate's office, no bond is required. If the money is managed by the personal injury plaintiff's Guardian, a bond will almost always be required. Again, individuals do not always qualify financially to purchase a bond. A Structured Settlement Annuity eliminates the requirement for a bond.
- *➤ Misappropriation.* Misappropriation by a professional trustee managing a trust is virtually negligible. The likelihood of misappropriation by a trust managed with a family member as trustee rises considerably. Family member trustees tend to view the settlement as the family bank account and distributions are often made for the benefit of the family as a whole rather than the minor or incapacitated person who was the plaintiff of the lawsuit and the recipient of the funds. There is virtually no risk of misappropriation if the funds are left with the Surrogate's Court. If the funds are managed by a Guardian, there is a higher risk of misappropriation. A Structured Settlement Annuity minimizes the risk of misappropriation.

INSTALLATION DINNE

Continued on Page 5

#### **CCBA OFFICER & TRUSTEE NOMINATIONS ANNOUNCED**

The Camden County Bar Association's Nominating Committee and Board of Trustees have nominated the following individuals for terms beginning June 1, 2024. They will be officially installed at the Installation of Officers Dinner on Thursday, June 13, 2024 at the Camden County Boathouse.

President

Matthew T. Rooney

President-elect

Thomas A. Hagner

Vice President

**Jeanette Kwon** Treasurer

**Timothy S. Farrow** 

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Carly K. Fowler

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Trustees Term ending 2027 Nancianne Aydelotte Timothy Dalton, Jr. Stephen M. DiStefano Erin P. Gallagher **Abraham Tran** Young Lawyer Trustee

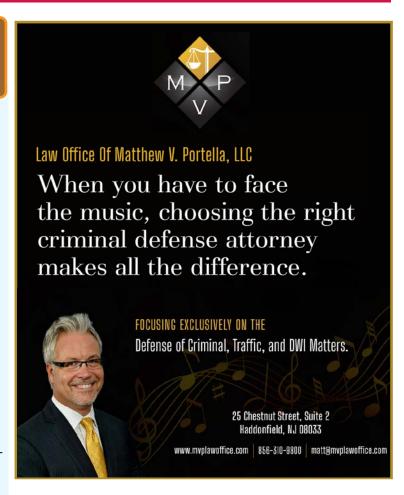
AS THE 98TH PRESIDENT OF THE CAMDEN COUNTY BAR ASSOCIATION Adam L. Cohler **JUNE 13**, 2024 Questions about the nominating process should be directed to Bar CAMDEN COUNTY BOATHOUSE

#### Options for Handling Funds of a Personal Injury Plaintiff who is a Minor Child or an Incapacitated Adult

Continued from Page 4)

- > Court Approval. Do distributions require court approval? Generally, distributions from a trust administered by a professional trustee do not require court approval. When a trust is managed by a family member, distributions do not usually require court approval. This is where mismanagement and misappropriation often come in. When the money is managed by the Surrogate's Court distributions do require court approval, which is both time-consuming and expensive. Where the personal injury recovery is managed by a Guardian, the distributions do require court approval, which again is expensive and time-consuming. The Structured Settlement Annuity could defer payments until the minor reaches majority, so court approval of distributions would not be required; however, there would be no access to funds during that period of time.
- ➤ Public Benefits. A trust with a corporate or family trustee would protect public benefits, if designed as a Self-Settled Special Needs Trust (SSSNT). Funds held in the Surrogate's office are available and, therefore, would not protect public benefits. The same is true of funds held by a Guardian. Funds in a Structured Settlement Annuity would be unavailable until the payment date, but public benefits could be protected if payments are then made into an SSSNT and if the Annuity has a commutation rider.

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#### **FINANCIAL FORENSICS**



#### Time To Call Your Accountant

#### by Martin H. Abo, CPA/ABV/CVA/CFF

Yep. It's our annual ritual. Normally around this time of every year Abo and Company sends out the same message. You should confer with your accountant (maybe that be us) with the clock approaching April 15th just ticking away. We still want you to file an

extension and it's just not too early to at least start considering such.

As you've heard us get on the case of those of you who are thinking "...I swear, I just don't want to file an extension. I'm afraid I'll be flagged as a late filer, will get hit with exorbitant penalties and, worse; increase my odds of getting audited".

Hey, when we file extensions for you, you're simply asking for more time to properly complete your tax forms. The IRS wants you to file "complete and accurate" returns. If you have to rush through your return, do not have all the proper support and information required, need to make estimates of figures, don't have time to adequately review and comprehend what is being filed - there is a good chance you may NOT be filing a complete and accurate return, even with the best of intentions.

We'll say it again and don't quote Abo and Company on this, but we'd venture a guess that the majority of all CPAs practicing in the tax arena file an extension. Now really - if it was a concern, don't you think we CPAs would file our own returns first?



Oh yes, one more reason we've found some individuals do not want to extend is because they are in the process of buying a new home or refinancing and their lender is requesting a copy of their tax return. Or how about getting out those financial aid applications for colleges? Most such lenders will accept a copy of an extension along with copies of documents substantiating income (W-2s, 1099s, K-1s, etc.), perhaps a "draft of the tax return" to be followed by the actual and copies of the prior year tax returns.

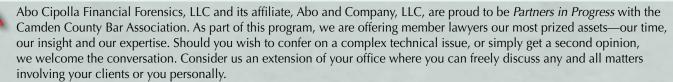
So, once again, here's "Abo's Top Fourteen" thoughts we want you to know about the different factors you may wrestle with if you don't have the money or information needed.

- 1. If you do not file by the deadline, you might face a failure-to-file penalty. Without a valid extension, a late filed return is subject to a 5% per month penalty on any unpaid balance. While this cannot be more than 25% of your tax (ouch), we believe this can and should be avoided. We'll talk more about this later.
- 2. If you do not pay by the due date, you could face a failure-to-pay penalty. The failure-to-pay penalty is ½ of 1% of your unpaid taxes for each month the taxes are not paid after the due date (i.e. an annualized 6%). This penalty is assessed on any taxes not paid by April 15th if the outstanding amount is more than 10% of the total tax obligation. It can be up to 25% of the unpaid taxes (ouch again).

Continued on Page 10

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Certified Public Accountants / Litigation & Forensic Consultants



#### Remember! It doesn't cost you anything to call us on a matter. It may cost you *dearly* by *not* calling us on that matter. We can help, so why not give us a call!

We strive to successfully meet the needs of a very diverse client base. We have carefully focused and developed our practice to specialize in the complexities of tax planning and compliance; financial consulting; accounting and review services; estate planning and compliance. We are here to assist our judiciary and legal colleagues in any and all accounting, tax, valuation, investigative or litigation support project where our team may be of benefit. We offer consultations in many areas, including the following:

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#### Time To Call Your Accountant

Continued from Page 9

- 3. If you do not pay the tax balances by April 15th, interest will be due on any amount not paid. As of the date of this writing, the interest rate on underpayments remains at 8% per annum. It was less but it's still not all that bad by itself and certainly a lot less than the rate charged by most credit card companies (even combined with the late-to-pay penalty).
- 4. The failure-to-file penalty is generally more than the failure-to-pay penalty. So, if you cannot pay all the taxes you owe, you should still file your tax return and explore other payment options in the meantime. Now you know why we want you to file an extension.
- 5. If you file your return more than 60 days after the due date or extended due date, the minimum penalty is the smaller of \$485 or 100 percent of the unpaid tax.
- 6. If you file an extension and you pay at least 90% of your actual tax liability by April 15th, you will not be faced with a failure-to-pay penalty if the remaining balance is paid by the extended due date. This extended due date is now October 15th with the filing of a valid automatic extension. By having 90% of your tax liability paid in, filing an extension gives you several extra months to come up with the remaining tax dollars at a relatively low interest/penalty rate.
- 7. If both the failure-to-file penalty and the failure-to-pay penalty apply in any month, the 5 percent failure-to-file penalty is reduced by the failure-to-pay penalty.
- 8. You will not have to pay a failure-to-file or failure-to-pay penalty if you can show that you failed to file or pay on time because of reasonable cause and not because of willful neglect. Feel like depending on IRS to

determine "reasonable"? The IRS might provide administrative relief and waive the penalties if you qualify under its First Time Penalty Abatement policy. To qualify, you must not have had any penalties in the prior three tax years. You must also have filed your current year's tax return on time and paid (or arranged payment for) any tax you might owe. As mentioned above, the IRS might waive the late-payment penalty if you can show there's a reasonable and justifiable reason for not paying on time. Administrative relief might also be provided if you received misleading advice from the IRS, but this is harder to prove and claim. For example, let's say you receive an IRS

failure-to-pay penalty on your 2023 income tax return. Assuming you

filed and paid properly your 2020, 2021 and 2022 returns and never

requested the first-time penalty abatement, you could qualify for a

penalty abatement on your 2023 taxes.

9. States can be even more problematic than the IRS. Most states will grant you an automatic extension of time to file if you obtain a federal extension. The problem often lies in that states have gotten very tough in disallowing extensions and thus imposing late filing penalties if 80% of the actual state tax liability is not paid in the form of withholdings or estimated payments. Perhaps this is why Abo and Company sounds so annoying by asking you if you owe tax and suggesting it be paid in (even before IRS) to so avoid the possible state disallowance of an otherwise valid extension. We've found New Jersey, Pennsylvania and New York to be especially vigilant in this regard. With the denial of the extension and imposition of penalty and interest charges from the original due date of the return, don't be surprised when you receive a letter from the state. Still, we suggest forwarding us the assessment before paying.

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#### Time To Call Your Accountant

Continued from Page 10

- 10. There are other reasons to consider filing an extension. Sure, the main reason for filing a valid extension is to avoid the confiscatory late-filing and late-payment penalties and interest we have seen reach as high as 47.5%. Even if you expect a refund, filing a valid extension permits you to defer funding a self-employed retirement plan (not a regular IRA, Roth IRA or Coverdell Education Savings Account).). It also enables selfemployed individuals to even delay opening a S.E.P. plan as late as the extended due date (let alone funding it). One strategy we often implement for our self-employed individual clients is to pay all taxes deemed due with an extension and then fund the retirement later when cash flow permits, as late as October 15th. The SECURE Act extended the deadline for employers to adopt a new traditional 401(k) plan from the last day of the tax year until the due date of that year's tax return (including extensions). That means the deadline for employers to adopt a new calendar-based plan will depend upon their tax status (i.e. filing deadline for an S corporation, LLC partnership was 3/15 but with an extension the deadline can be 9/15; filing deadline for a C Corporation, a sole proprietorship or a sole member LLC is 4/15 or an extended deadline of 10/15). While this change would not give employees more time to make salary deferrals, it would give employers more time to decide whether or not they want adopt a new 401(k) plan in order to make a year-end profit sharing contribution.
- 11. If you're a U.S. citizen or resident who lived and worked outside of the country on the tax-filing deadline, you may automatically get two extra months to file your return and pay any amount due without having to request a tax extension.
- 12. People affected by certain natural disasters may automatically get more time, too (the time varies; check the list of qualifying disasters).
- 13. Some members of the military also get extra time automatically, depending on where they are and what they're doing.

14. If you're expecting a <u>tax refund</u> and don't file your federal income tax return on time, there's no late charge. But you won't get your refund until you file. You have three years from the due date of your tax return to file and claim your refund. After that, the money goes back to the US Treasury.

There's a simple way to extend this daunting deadline - File an extension, form 4868, and just make sure it's postmarked by April 15th. It's only one page - actually a half page - and doesn't even require a signature. That's it! You will then have until October 15th to get all of your documentation together, have ample time to thoroughly review and, more importantly, understand the returns and, finally, to then file them in a timely matter.

Alas, this still may not suffice for many of our clients and friends. If you owe so much tax that you still won't be able to pay them by the extended due date of October 15th, one option may be to confer with us to file the paperwork to enter into an installment agreement with the IRS. On these forms you effectively inform the government how much you can afford to pay each month. You also tell them the specific day of each month you will make this payment. The IRS will still charge interest at the prevailing federal rate as well as a reduced monthly failure-to-pay penalty (.25%) on the outstanding balance. DO NOT TAKE THIS LIGHTLY. Not making such a scheduled payment will cause the remaining outstanding balance to become immediately due.

Martin H. Abo, CPA/ABV/CVA/CFF is a principle of Abo and Company, LLC and its affiliate, Abo Cipolla Financial Forensics, LLC, Certified Public Accountants – Litigation and Forensic Accountants. The firm is a Partner in Progress of the Camden County Bar Association. With offices in Mount Laurel, NJ, Morrisville, PA and Franklin Lakes, NJ. Marty can be reached at marty@aboandcompany.com or by calling 856-222-4723.



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By Jim Hamilton

Spring can be a busy time for many things, from cleaning homes and offices, Grapefruit League baseball games, and enjoying more outdoor activities due to the longer daylight hours and warmer temperatures. It also happens to be a busy time in the world of wine. Many "cult" wineries offer their biannual allocations to those who by early recognition managed to get on their mailing lists of hard-to-get wines. While the big Bordeaux bash mentioned last month occurs in the throes of January winters, many organizations and wine distributors conduct spring tastings for those in or around the wine trade to showcase wines they hope will inspire those who sell or write about them to bring them to the attention of the ultimate judges of their worth—consumers.

While many portfolio tastings are expansive events featuring upwards of a thousand different wines, I was fortunate to attend a much more intimate tasting at the New York City offices of importer and distributor Winebow Fine Wine & Spirits that featured the German Estates portfolio of Derek Vinnicombe. I have had the pleasure of meeting and tasting with Derek several times in the past and always was impressed by his knowledge of German wines that, despite being raised in Great Britain,

he has passionately cultivated since he was a wee lad. He has an infectious enthusiasm for the wines of Germany that is not limited to those made by producers he represents. It can always enhance the tasting experience when the person pouring the wines is from the winery, and that typically is the case when Derek highlights the estates in his portfolio.

Since spring's warmer weather often invites consumers to open more white or lighter red wines, let's talk about some of the wines that should be available to us at prices that, even in today's inflationary environment, represent particularly good value for the quality they offer.

Stefan Bollig poured four wines from his estate, Bollig-Lehnert, and while all were outstanding, let's focus on one that is both the least expensive and will most likely appeal to those who are skeptical about trying German wines. 2020 Bollig-Lehnert Dhroner Hofberger Riesling Spätlese Dry was fashioned from grapes that were ripe enough to produce the quintessentially off-dry German Riesling but was vinified dry by converting nearly all the grape's sugar into alcohol. Therefore, while a Spätlese German Riesling typically will have an alcohol level of less than 10%, this dry version is slightly more than 11%.



It offers the vibrancy one expects from a Riesling, but with a weighty richness that more than maintains the acidity as a supporting feature. The fruit profile is one of ripe peaches subtly framed by allspice with an almost chewy texture that coats the palate with fruit without a trace of "sweetness."

A wine made from grapes grown on one of the premier Mosel vineyards was poured by JJ Karp of Karp-Schreiber, a winery founded in 1664. The 2022 Karp-Schreiber Brauneberger Juffer-Sonnenuhr Riesling Kabinett is simply a lovely and affordable wine, with an attack that is rather brisk for a Kabinett (the first level of residual sugar within the "Pradikat" quality classification of German wines). A perception of slate and minerals along with white grapefruit and a mélange of stone fruits accompany a fleshy texture and a well-composed finish. It is

 $Continued\ on\ Page\ 13$ 



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## WIRON

Continued from Page 12

impeccably balanced, with its acid tension restrained well by the fruit and its honied hint of subtle sweetness.

Another venerable, and probably better known and more widely distributed winery, is Dr. H. Thanisch. While the stars of this winery's lineup are those made from one of Germany's most famous vineyards, Bernkasteler Doctor, one of which was poured for us, the wine that value hounds may want to sniff out is the 2022 Dr. Thanisch Feinherb Riesling. The grapes come from the steep hills in the middle Mosel region, and the wine is made in the feinherb style, which represents a Goldilocks approach of being not too dry but not overtly sweet. The vineyards in which the grapes were grown possess blue and black slate soils that can be sensed in this wine, as there is a flinty undercurrent to its subtle red fruit profile, with a lean raspberry impression complementing more typical white peach characteristics. Perhaps the feinherb paradox here is that there is at once a leanness to the structure but also a richness to the bountiful fruit.

One of the revelations at this tasting was experiencing the wines of Famiile Allendorf. Clever marketing often is a way to get consumers to notice a wine, and I suspect that may work for Allendorf's attention getting dry Riesling, 2020 Save Water Drink Riesling Dry. While it is a wine that certainly deserves buying for more than just its catchy name, let's discuss an affordable alternative to a wine type that has become increasingly cost-prohibitive - France's red Burgundies. Although German producers today often will use the more familiar grape name of Pinot Noir on the label, Allendorf employs the German name for the variety. 2020 Allendorf Spätburgunder Trocken is an estate grown Spätburgunder (i.e. Pinot Noir) that is bone-dry, offering strawberry and red currant fruit adorned by pepper and clove spices that meld deftly in a firm yet velvety finish. It should arouse envy in producers from other countries who charge considerably more for wines of similar quality.

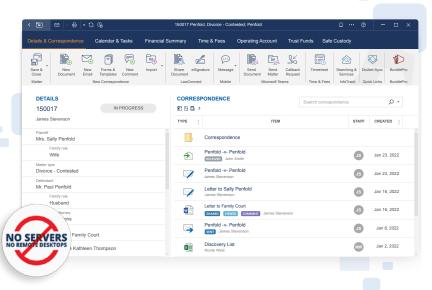
Finally, let's conclude by focusing on a wine by a producer that by German standards is one of the new kids on the block. Dr. Karl Heyden founded his estate in 1999 by acquiring some of the top vineyards in Oppenheim, located in the Reinhessen, one of Germany's 13 wine growing regions. Today it is run by his talented son, Frank Heyden, who studied at Geisenheim University's well-regarded school of winemaking, and who poured for us at this event. He shared a lovely Kabinett Riesling and an engaging Pinot Noir, but let's talk about another best buy wine made from a grape variety that lacks the prestige of the other two mentioned. 2021 Doctor Heyden Oppenheimer Silvaner Trocken QbA Alte Reben is a lot of information to put on a wine label, but precision always has been a German quality. Perhaps it will be useful to interpret what all this means. Oppenheimer has nothing to do with the famous physicist; rather, it means the grapes used to make this wine are from vineyards in the town of Oppenheim. Trocken is German for dry, so we know this is a dry wine with little, if any, perceptible residual sugar. QbA (Quälitatswein bestimmter Anbaugebiete) is a classification of wines that are more than simply table wines but are not within the Prädikat class of wines. One of the distinctions between QbA and Quälitatswein mit Prädikat (QmP) wines is that unlike in the latter classification, QbA wines can be chaptalized. Named after Jean-Antoine Chaptal, the French chemist who developed the process, chaptalization simply means sugar can be added to the grape must if desired or needed to increase the level of alcohol achieved after fermentation. Prior to climate change, the temperatures in Germany did not regularly permit grapes to fully ripen, so the ability to add sugar to the grape must during fermentation increased the amount of alcohol that remained after the conversion process was completed. Alte Reben is German for old vines, which usually have deeper roots that can extract more from the terroir, and possess less vigor, resulting in creating fewer grapes per vine. With less competition for

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the available nutrients, old vine grapes can possess greater concentration and flavor intensity. Finally, Silvaner is the grape variety used to make this wine. It is an ancient variety that when over-cropped can produce a neutral tasting, uninspiring wine. However, when the yield is low, an accomplished winemaker can craft a delightful wine that expresses its terroir vividly. This Heyden Silvaner is a lively wine offering spicy citric fruit impressions, lemongrass nuances, and a firm, dry grip that provides a nice counterbalance to its broad, rich texture resulting in a wine that delivers the winning combination of quality and value. If you have not yet tasted a wine made from the Silvaner grape, this would be a good one to try. Cheers!



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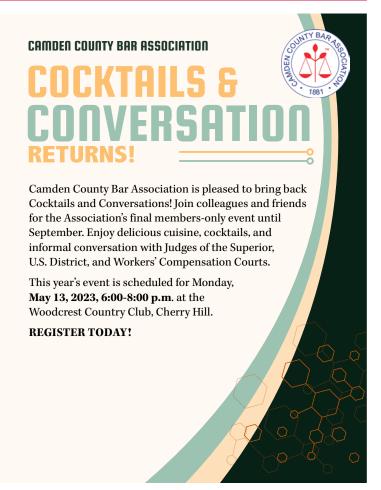
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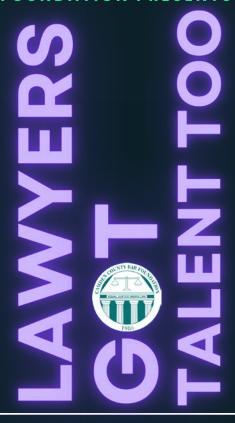
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10:00am – 11:00am	Municipal Redevelopment Deals	John Kearney, Esq Kearney & Associates, P.C.
11:00am – 12:00pm	Business Development for New and Seasoned Professionals	Michael J. Dennin, Esq. Law Offices of Vincent J. Ciecka, P.C.
	12:00pm – 12:30pm	Lunch
12:30pm – 1:30pm	An Introduction to Social Security Law	Alan Polonsky, Esq. Polonsky & Polonsky Attorneys At Law  Rob Petruzelli, Esq. Petruzzelli P.C.
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"Helping Parents Obtain Guardianship
Over Their Disabled Children"



## **May 8, 2024**Wednesday, 4:30 pm - 6:10 pm

#### Discussing these topics and more:

- Providing pro bono assistance to parents who need guardianship for their disabled children.
  - A View from All Sides: the Court, Surrogate and Practitioner

Attorneys will receive 2 <u>free</u> NJ CLE credits in exchange for committing to accept 1 pro bono guardianship within 1 year through The SJLS Guardianship Project for Children.

#### **Speakers:**

The Honorable Paula T. Dow, Presiding Judge General Equity
The Honorable Brian J. Carlin, Burlington County Surrogate
Jeffrey S. Apell, Esq., Posternock Apell, PC
Michelle T. Nuciglio, Esq., South Jersey Legal Services, Inc.

#### **Moderator:**

Gary W. Boguski, Esq., Taylor & Boguski, LLC



#### **REGISTER HERE:**

https://forms.gle/CUxZceU1duBovxWZ9

#### **Presented by:**

South Jersey Legal Services, Inc., Private Attorney Involvement Program



#### **New Jersey Judiciary - Office of Attorney Ethics Volunteer Application**



General Instructions: Please print clearly. To find contact information, please go to: njcourts.gov.

Complete the Volunteer Application and email it, along with your resume, to OAE.MBX@njcourts.gov or you can mail your application and resume to:

> Disciplinary Appointments Coordinator Office of Attorney Ethics P.O. Box 963 Trenton, NJ 08625-0963

Volunteers must either reside in or maintain a law office in the District they serve. While District Ethics Committees and District Fee

					zed by counties, there are s f work or residency.	some e	exceptions.	Unless yo	ou spec	city a parti	cula	ır comn	nittee, you
Гу	pe of Committee I a	m seel	king appoi	ntment t	o (check all that apply):								
	☐ District Ethics C	ommit	ttee				☐ District	Fee Arbit	ration (	Committee			
	☐ Attorney Member	er					☐ Public I	Member					
IIOI	Name: Last						First Middle					Middle Initial	
	Home Address: Str	eet					City				St	tate	Zip Code
201181	Home Phone	Cell I	Phone	Ema	ail Address					County of	f Res	sidence	
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	☐ Junior High	□ Hi	igh School		Some College	ate	☐ Bachelo	or $\square$ A	dvance	ed Degree			
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ı	Firm/Employer Na	me											
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Name: Last First				R	Relationship (friend, coworker, etc.)  Daytime Phore				none				
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	Name: Last				First	R	Relationship (friend, coworker, etc.)  Daytime Phone					none	
	Home Address Street						City State Zij					Zip Code	

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Do you have prior Committee?	rior service on the Supreme Court Fee Arbitration				□ No	If yes, provide start and end dates:		
Have you provided Committee?	Have you provided any prior service on the Supreme Court Ethics Committee?					If yes, provide start and end dates:		
Have you provided Committee?	I any prior service on the Supre	me Court Ethics		l Yes	□ No	If yes, provide start and end dates:		
Have you ever bee minor traffic matte	n <b>charged</b> with a criminal offer er	nse <i>other</i> than a		l Yes	□ No	If yes, explain:		
traffic matter?	n convicted of a criminal offen			l Yes	□ No	If <b>yes</b> , explain:		
Please share any a Arbitration or Ethi		would like the Court	to consid	er when e	evaluating y	your application to serve on the Fee		
In addition to Engi speak another lang		□ No Language(s	s) and You	ur Profici	ency Level			
Relevant Special S	kills / Activities / Certificates							
To be completed	by Attorneys:							
Licensed Attorney			Is C	Current St	tatus "Activ	ve"?		
□ Yes	□ No			□ Yes □ No				
Year of admission	to NJ Bar (minimum 5 years)	Firm Size	Principle	e areas of	practice:			
Do you represent a disciplinary system	any party before any Supreme C n?	Court Committee in the	he 🗆	Yes	□ No	If <b>yes</b> , specify:		
Have you ever resolved a matter filed against you in NJ, in any state, or in ☐ Yes ☐ No any jurisdiction, by diversion or agreement in lieu of discipline or similar diversionary program?								
to those questions	rt Committee application proces is voluntary. Responses will su	pport an aggregate a	issessmen	nt of the d	iversity, inc	emographics and identity. Your response clusivity, and representativeness of New mation as each question includes a "no		
	be shared with current or prosp					d support committees. Individual ggregate demographic information may be		

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#### NJ Judiciary Volunteer Application

In furtherance of the Court's goals to support diversity and inclusion through the representativeness of Supreme Court Committees, we welcome you to share any additional information you choose relating to diversity of identity, experience, background, or perspective.						
To the best of my knowledge, all information set forth in this Volunteer Application is true and accurate.						
I have attached my resume to this application:	☐ Yes	□ No				
Applicant Signature			Date			
s/						