

Please return your registration along with a check payable to:

New Jersey State Safe  
Deposit Association

P .O. Box 2182

Brick, N.J. 08723

Phone: 1-800-382-0234

Fax: 732-458-5511

E-mail:

[njssda-cfreda@comcast.net](mailto:njssda-cfreda@comcast.net)

[www.njsafedeposit.com](http://www.njsafedeposit.com)

### **Directions To The APA Hotel Woodbridge**

#### **New Jersey South- bound/Northbound**

Garden State Parkway to Exit 131A.  
Hotel is on the right at the exit.

#### **Newark Liberty International Airport**

New Jersey Turnpike South Exit 11.  
Garden State Parkway North to Exit  
131A.

Hotel is on the right at the exit.

#### **South Jersey**

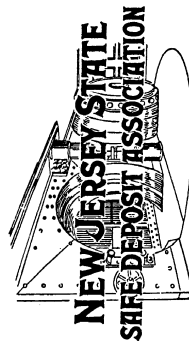
New Jersey Turnpike North to Exit  
11.  
Garden State Parkway North to Exit  
131A.

Hotel is on the right at the exit.

#### **Or go to:**

**[www.apahotelwoodbridge.com](http://www.apahotelwoodbridge.com)**

for door to door directions from your  
area.



P.O. Box 2182  
Brick, New Jersey 08723

## **The New Jersey State Safe Deposit Association**

### **Annual Seminar**

## **Back to the Basics & Decedent Policies**

*Presented by:*

**Thomas Kasper**  
Treasurer  
NJSSDA

May 25, 2017

APA Hotel  
Woodbridge  
Iselin, NJ

## ***Our Speaker***

**Tom Kasper** is a retired banking professional with more than 30 years of retail banking experience. Mr. Kasper was a VP of the Treasury Management area at Peapack-Gladstone Bank which included overseeing the management of the Safe Deposit Department. His responsibilities included annual reporting to the State of NJ abandoned property division, as well as coordinating release of property to the State of NJ for the Bank. Mr. Kasper was most recently associated with Lakeland Bank. He has served on the NJSSDA's Executive Board for over 15 years in various roles, the most recent Treasurer.

## ***Our Program***

### ***Back to the Basics***

This presentation will cover many aspects of safe deposit, including the following:

**General Rental Procedures** - Policies and procedures regarding safe deposit rental.

**Records and Files** - Why proper record keeping and file maintenance are an important part of the Safe Deposit Department.

**Contracts** - What types of contracts are available for safe deposit box rentals in your institution? What documentation is required for each type?

**A Deputy** - What is a deputy and when is it used? How do you appoint a deputy and how long does it remain in effect?

**Safe Deposit Access** - Although all phases of safe deposit operations are very important, access is the most critical area. Do you know the procedures that must be followed without deviation?

### ***Decedent Policies***

This presentation will educate everyone so they are confident handling a decedent box. The topics to be discussed include the following:

**Glossary of terms** - Being able to identify terms associated with decedents.

**Rental Policies upon Death** - Immediately following the death of a renter, specific procedures must be followed. Those include: sealing the box, establishing a decedent file, identifying appropriate parties and closing the box.

**Will Search** -Occasionally it will be necessary to search a decedent's safe deposit box for a Last Will & Testament. What items can be removed? Who is permitted to initiate a will search?

**Types of Contracts** - Each different type of rental contract has its own set of rules that must be followed concerning decedent boxes.

**New Jersey Inheritance Tax Laws**

**Access Procedures and much more**

### ***Question & Answer Period***

## **Meeting Information**

**When:** Thursday, May 25, 2017

**Where:** APA Hotel Woodbridge  
Iselin, New Jersey

**Registration:** 8:30 am

**Seminar:** 9:00 am— 12:00 noon

**Cost:** \$75.00 per person

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## **Registration**

*Please reply by May 22, 2017*

Bank \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Contact \_\_\_\_\_

Position \_\_\_\_\_

E-mail address \_\_\_\_\_

Attendees:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Number of attendees \_\_\_\_\_ @ \$75.00 = \_\_\_\_\_