

# Mechanics of E-Filing in Estate Planning with the Probate Court

*Tips to help you have your cases accepted for filing on the first try*

Did you know that you have a secret weapon when it comes to probating estates? It is filing your probate cases, whether they be formal, informal, or voluntary—using the Probate Court's e-filing process.

Learn why it makes sense to file your cases using the e-filing process. Get step-by-step instruction on what it takes to file an Informal Probate, a Formal Probate and a Voluntary Administration using the Probate Court's e-filing system. Come away with the tips needed to have your cases accepted for filing on the first try.

Armed with this knowledge, you can effortlessly file your probate cases from the comfort and convenience of your office, home, or anywhere you have secure access to the internet at any hour of the day on any day of the week.

## Agenda

- Benefits of E-Filing
- Preparing the Documents to Be Filed and Electronic Signatures
- Setting Up Your E-Filing Account
- Submitting a New Probate Case: Voluntary with a Will and without; Informal with a Will and without; Formal with a Will and without
- Adding a Filing to an Existing Case That Was E-Filed
- What to Do If Your Filings Are Rejected
- Common Mistakes to Avoid
- How to Check on a Case That Has Been E-Filed Using the Attorney Portal
- Using the Probate Court Virtual Registry for Resolving Issues with an E-Filed Case

## Speaker



**KAREN B. JOHNSON, JD, LL.M.** is a co-founder of the law office of Madge & Johnson, PC, a law firm concentrating on estate planning and elder law, located in Westford, Massachusetts. Karen is a graduate of Duke University School of Law and holds an advanced degree (LL.M.) in Taxation from Boston University School of Law. She has been a practicing attorney since 1994. As an Elder Law and Estate Planning attorney, Karen offers her clients a wide array of planning services, from planning for incapacity and simple wills to helping multi-generation millionaire families utilize their estate tax credits efficiently. Karen advises clients on how best to transfer and protect their assets. She also helps clients apply for Medicaid and other governmental assistance programs. As an educator, Karen has taught lawyers how to draft estate plans as an Adjunct Professor at Western New England School of Law, one of the few law schools in the country offering an advanced law degree in Elder Law and Estate Planning. Karen has been designated as a Massachusetts Super Lawyer from 2015 to present.



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## Dates & Location

Register at [www.mcle.org](http://www.mcle.org)

### LIVE WEBCAST

Wednesday, April 6, 2022  
12:00 noon–1:00 pm  
Program Number: 2220127WBC

### REBROADCAST

Thursday, April 21, 2022  
3:00 pm–4:00 pm  
Program Number: 2220127RBC

### REBROADCAST

Friday, April 29, 2022  
9:00 am–10:00 am  
Program Number: 2220127R1

### ON DEMAND WEBCAST

View after Friday, April 29, 2022  
Program Number: 2220127WBA

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