

**REGISTER OF WILLS  
FISCAL YEAR 2025 BUDGET TESTIMONY  
APRIL 15, 2024**

**INTRODUCTION**

Good afternoon, President Johnson and Members of City Council. I am John P Sabatina ESQ., Register of Wills and Clerk of Orphans' Court. Joining me today are Emilio DiGregorio, Deputy of Government Affairs and Erald Dika, Finance Director. I am pleased to provide testimony on the Register of Wills' Fiscal Year 2025 Operating Budget.

**DEPARTMENT MISSION & PLANS**

**Mission:** The Register of Wills & Clerk of Orphans' Court (ROW) serves the residents of Philadelphia with professionalism, compassion, and integrity in overseeing the administration of estates, the issuance of marriage licenses, and the fee collection and record keeping of all Philadelphia County Probate Estates, Trusts, Guardian Accounts, and Marriage Licenses and Records.

**Plans for Fiscal Year 2025:** Over FY25, The Register of Wills Estate Administration Program's core mission will be to continue to educate Philadelphians on the need for Estate Planning and stabilize the Archives Collection. This will be in conjunction with the continuation of the Estate Administration's Program of providing essential services, which include virtual probates, to the Philadelphia Community. In addition, the department will continue the outreach program throughout communities to educate Philadelphians on the complexities of the probate process, while emphasizing the need for heirs to act quickly to protect their inheritances. The Community Outreach team continues to provide guidance to the public on proper steps to ensure that their estate and assets can be passed on. With the aid of language facilitators, the outreach team schedules many events throughout different communities from a diverse cultural background keeping the public informed and educated on probate legal matters.

Additionally, the Register of Wills office will continue to focus on stabilizing its Archive Facility and Historical Documents. Digitization and preservation are essential to secure the integrity of the records housed within the facility and will streamline the process required to access these records. The department has already embarked on this journey by onboarding a subject matter expert in the preservation and restoration of historic records.

Moreover, the office is working to comply with the latest state audit findings and will seek a new legacy system that is more efficient with our operation as well as to reinforce the internal control options that the current system is lacking. The ROW has extended the life of our existing software through security upgrades, while we continue to look for a suitable vendor.

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## PROPOSED BUDGET OVERVIEW

General Fund Financial Summary by Class						
	FY23 Original Appropriations	FY23 Actual Obligations	FY24 Original Appropriations	FY24 Estimated Obligations	FY25 Proposed Appropriations	Difference: FY25-FY24
Class 100 - Employee Compensation	\$4,309,771	\$4,089,933	\$4,450,243	\$4,450,243	\$4,450,243	\$0
Class 200 - Purchase of Services	\$406,959	\$406,959	\$421,959	\$421,959	\$421,959	\$0
Class 300/400 - Materials, Supplies & Equipment	\$140,236	\$92,140	\$152,596	\$152,596	\$152,596	\$0
Class 500 - Contributions		\$145,000				\$0
<b>Total</b>	<b>\$4,856,966</b>	<b>\$4,734,032</b>	<b>\$5,024,798</b>	<b>\$5,024,798</b>	<b>\$5,024,798</b>	<b>\$0</b>

### Proposed Funding Request:

The proposed Fiscal Year 2025 General Fund budget totals \$5,024,798, level with Fiscal Year 2024 estimated obligation levels. With little else changed, this budget represents the amount needed to maintain current staffing levels and provide funding for the successful operation and initiatives of the office.

The proposed budget includes:

- \$4,450,243 in Class 100, no increase over FY24 estimated obligation levels. This funding will maintain the office's 73 full-time positions in addition to the office's part time, season, and temporary positions.
- \$421,959 in Class 200, no increase over the over FY24 levels estimated obligation levels, to support the Register's vision regarding racial disparities throughout communities. In addition, this funding will allow for the office to maintain its professional services, update its case-management software funded in FY24, continue to lease office equipment, provide necessary transportation, postage, and maintain equipment repairs.
- \$152,596 in Class 300/400, no increase over FY24 estimated obligation levels. This funding will maintain office supplies, computer equipment and printing costs associated with Orphans' court mandated filings, and the office's archived records.

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### STAFFING LEVELS

The department is requesting 73 budgeted positions for FY25, level with FY24. These positions ensure outstanding customer service and a user-friendly environment to those requiring the Register of Wills and Orphans' Court's services. The Register of Wills continues to look for ways to provide the City of Philadelphia with the absolute best services through its diverse staff.

Employment Levels (as of December 2023)		
	FY25 Budgeted	Filled as of December 2023
Number of Full-Time Positions	73	67
Number of Part-Time Positions	2	0
Number of Exempt Positions	73	67
Number of Executive Positions (deputy level and above)	7	7
Average Salary of All Full-Time Positions	\$65,797	\$65,797
Median Salary of All Full-Time Positions	\$60,099	\$60,099

### NEW HIRES

New Hires (from 7/1/2023 to December 2023)	
	Total Number of New Hires
Black or African American	5
Asian	1
Total	6

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### **PROGRAM BASED BUDGETING: REGISTER OF WILLS**

**Program Name:** Estate Administration

**Program Number:** 11

**FY25 Proposed General Fund:** \$3,897,205

**Program Description:** The Estate Administration program oversees the probate process for Philadelphia estates. This includes the issuance of Letters Testamentary and Letters of Administration, collection of fees and inheritance taxes, and the creation and maintenance of the records.

**FY25 Strategic Goals:** Stabilization of the Register of Wills Historic Archives.

- New Legacy System.

### **Program based budgeting: REGISTER OF WILLS**

**Program Name:** Orphans' Court

**Program Number:** 12

**FY25 Proposed General Fund:** \$ 1,127,593

**Program Description:** The Orphans' Court Administration program oversees the creation, maintenance, and associated fees for trust, decedent, and guardian accounts as well as the issuance of marriage licenses in Philadelphia.

**FY25 Strategic Goals:**

- New Legacy System
- Digitizing Historic Records.

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**OTHER BUDGETARY IMPACTS**

**Federal and State (Where Applicable)**

NA