



Connect with your Neighbors.....Change the World

## 2023 Register of Wills Candidate Questionnaire

Name: Madame Register Tracey L. Gordon	Campaign Manager’s Name: Jacqueline Jeffries
<p>Campaign Website: Campaign Website Under Construction (Please see attached documents and links for information on initiatives spear-headed by Register Gordon)</p> <ul style="list-style-type: none"> <li>● <b>Probate Deferment Initiative</b> <a href="https://www.phila.gov/programs/probate-deferment-initiative-pdi/">https://www.phila.gov/programs/probate-deferment-initiative-pdi/</a></li> <li>● <b>“Tangled-Title” Initiative and Fund</b> <a href="https://www.inquirer.com/real-estate/housing/property-will-help-philadelphia-tangled-title-register-20210403.html">https://www.inquirer.com/real-estate/housing/property-will-help-philadelphia-tangled-title-register-20210403.html</a>  <a href="https://www.phillyvip.org/tangled-title-fund/">https://www.phillyvip.org/tangled-title-fund/</a></li> </ul>	E-mail: reelectracey@gmail.com
Phone number: (610) 803- 7624	Date: 03/19/2023

### Instructions

Please complete the following questions on this form and return by email to [gmgilman@gmail.com](mailto:gmgilman@gmail.com). Note: Although these questions are uniform, we recognize that the perspective of the incumbent and challengers will differ based on whether your

viewpoints arise from within or without the Office.

## **I. Background**

### **1. Please describe your professional and educational history and how it prepares you for the position of Register of Wills.**

I have a B.A. from Temple University majoring in business administration and risk management. I also served as a Block captain and community activist for over 20 years and held various positions in government. These roles have prepared me for the role of Register of Wills by giving me the needed skill set in outreach, customer service, data analyzation, leadership, and policy. I am equipped to make shrewd decisions as it pertains to estate oversight for constituents as well as having the ability to be decisive and fair while remaining within the confines of Pennsylvania state law. Additionally, my background in risk management has proven to be a crucial skill set for this role considering the necessary amends to legislation to resolve Philadelphia's "Tangled-Title" crisis which directly impact the ability for constituent's to preserve their generational wealth as well as other ROW challenges such as the preservation of historical documents.

### **2. Why do you want to hold the Office of The Register of Wills & Clerk of Orphans' Court? What skill set do you bring that qualify and make you stand out for this position?**

I'd like to be re-elected as the Register of Wills of Philadelphia to continue the crucial outreach and awareness services to educate Philadelphia constituents on the functions of the office and the importance of Estate Planning as well as to continue the probate initiatives I've created to combat Philadelphia's "tangled-title" crisis – *a phrase coined by Attorney Judy Berkman to express what happens to heirs' property – property that is passed down to surviving heirs (usually family) if the owner of a property dies without leaving a Will or an estate plan. Without a Will or estate plan, the property is inherited by all next of kin of the deceased owner but the deed of the property remains in the name of the deceased owner which creates a multitude of legal roadblocks for the heirs hence "tangling the title".* Due to this, many constituents are disenfranchised when it comes to access to services that are provided by the office as well as other dire resources needed to maintain property and preserve communities. As mentioned above, the skill sets that qualify me for this role and make me stand out are my acquired skills in community outreach, policy and legislation, government, business, and risk management.

### **3. How much money have you raised, and how much do you anticipate raising? What is your plan to win?**

Our fundraising goals are currently ongoing and will be made public via the filing of this quarter's campaign finance report. This campaign relies heavily on grassroots efforts. We achieve this through consistent outreach to constituents and by prioritizing service to constituents year round – not just during campaign

season. Our plan for winning encompasses the fundamentals of campaigning and GOTV along with other in-house strategies.

**4. What endorsements have you obtained and what others do you expect?**

This campaign is still actively petitioning for endorsements and will announce to the public as endorsements are confirmed. So far, we have confirmed endorsements from several wards and union organizations.

**II. General Duties of Office**

**5. Please briefly explain the mission of the Office of The Register of Wills & Clerk of Orphans' Court. To whom, or to what department, is this office accountable?**

The most important function of the Register of Wills office is to provide seamless service to Philadelphians in the administration of an estate and appointments of qualified administrators. In addition to the estate related services, the office acts as the clerk of the orphans' courts accepting filings for guardianship and appeals in relation to estate matters. Timely service of these filings are essential to the judicial process so many rely on. Lastly, our office also conducts life changing services in the issuance of marriage licenses and the preservation of these documents which I hope to continue improving and modernizing as the Register of Wills.

**6. Why is The Register of Wills important?**

The Register of Wills office is responsible for overseeing the probate process for wills and estates. The probate process involves validating a will. The Register of Wills office is important because it serves as a central point for managing the probate process, ensuring that the wishes of the deceased are carried out correctly and efficiently.

Overall, the Register of Wills office plays a crucial role in the legal process of managing the affairs of the deceased, ensuring that their wishes are respected.

**7. How does this office interact with and affect the citizens of Philadelphia? Has that interaction increased or decreased? Why or why not?**

Traditionally, constituents come into contact with the office when a marriage or a person passing occurs. This has since changed with the arrival of my administration. I created a fully dedicated outreach unit which has a presence in the communities in which we serve to spread the message on what the office consists of and its function. This is a vital piece to bring to people so they can better prepare for their future and their families future.

**8. What is the annual budget, and what expenditure classes take up a good portion of it, whether salaries, programming, or other items?**

The annual budget can range from 4 to 5 million per year. We are a self-sustaining office, our revenue covers more than our expenses year over year. Since we are a service oriented office our salaries, operational costs and infrastructure cover the largest portions of our budget.

**9. What are the staffing needs? Is there room for growth or changes in job numbers, skills, or requirements?**

We are consistently revisioning our operational workflow and evolving as we arrive at a more efficient process in services. This is an ongoing effort.

**10. Do you see a need for an increased budget to perform this work?**

On the service side we find ourselves in a good place, but on the operational side, I have voiced concern to city council and the mayors' administration to allocate additional funding to the restoration and preservation of our historic records, dating back to the 1800's.

**11. How much revenue does your department generate annually? Are there departmental expenditures that aren't covered by City appropriations, and do they require you to find other ways to supplement your department? What, if any, other financial resources do you use to supplement expenditures for your department?**

Our revenue is historically in the 4-5 million dollar range. All expenditures are allocated from city funding, but my office has taken the proactive approach in grant requests for eligible projects in addition to state funding requests.

**12. Would you support efforts to have your department revenues deposited into a Public Bank? Would that create any additional positive/negative actions on the part of your department?**

Yes, I would certainly be supportive of that effort. I do not see a negative.

**13. Are your department revenues going to the City of Philadelphia General Fund or some other place?**

All of our revenues are deposited to the City's general fund.

**14. Are you in support of the Wealth Tax and do you believe it would have any possible effects on the citizens going through probate and/or any additional work this office would have to perform?**

I continue to monitor the legislation as it's debated in city council, but my support would certainly be contingent upon ensuring that this tax would not affect lower and middle class working families. We see so often, legislation affects these communities disproportionately due to the lack of resources available for financial literacy.

**15. What type of programming and changes have been implemented over the past three years, and how successful have those changes been? How would you measure that success?**

Our outreach program has been a huge success. Over the last 3 and a half years we have conducted close to 200 events, even through the pandemic. Zoom has provided a new way of communicating and my office has taken full advantage of utilizing technology in areas we can.

**16. What additional programming and changes would you like to implement that would benefit the public? (i.e., internships, technology, status of old records, documentation, archiving, storage, and historical preservation).**

-Internships: Are already in place.

-Technology: Is constantly being upgraded to provide efficient service (we have incorporated the use of Zoom for our hearings and also added other online services to continue the operation of the office during the pandemic).

-Preservation: We currently are reviewing RFPs for this specific service to preserve historical documents.

-Digitization- Also, reviewing RFPs on this as well. We hope to bring our entire archives online in my next prospective term.

**17. How diverse is this office compared to three years ago?**

I introduced new talent to the office while simultaneously respecting and valuing the experience and knowledge of the previous administration. I have retained 60-75% of the staff from the Donatucci administration throughout my first four years as Madame Register. I have also ensured that the newly onboarded talent were a true representation of the many demographics of the city of Philadelphia – a consideration that has been overlooked in the past. My administration has been intentional in increasing the diversity within the ROW office and has onboarded dozens of women and other minorities. The report can be found on the controller's website.

<https://controller.phila.gov/office-of-the-city-controller-releases-annual-diversity-review/>

**18. There has been some controversy around office hiring practices that have folks questioning the incumbent's leadership ability. Please speak to that.**

Our hiring practices have always been based on the qualifications of the best candidate available. My administration frequently posts job opportunities on the city's HR website to ensure fair and equal hiring practices are followed.