

## IRA Trusts: Rules and Mistakes - Live Video Webcast

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December 7, 2016

National Business Institute

**Date:** December 7, 2016

**Time:** 11:00 a.m. - 6:00 p.m.

### **Confidently Advise Your Clients on IRA Trusts**

Do you have the knowledge you need to advise your clients on IRA trusts and avoid making costly mistakes? This insightful course will walk you through the essential elements of an IRA trust, clarify the laws and rules governing them, zero in on common mistakes and teach you how to avoid them. Protect your client's best interests - register today!

- Take a closer look at recent changes that affect IRA trusts and discuss what changes are proposed.
- Determine the pros and cons of establishing an IRA over other trusts.
- Learn how improperly designating the IRA beneficiary can have negative consequences.
- Review the rules that apply to retirement account rollovers to avoid potential pitfalls.
- Examine drafting do's and don'ts for IRA trusts.

### **Who Should Attend**

This course is designed for attorneys. Financial planners, accountants and CPAs, and trust officers may also benefit from attending.

### **Course Content**

1. New Laws, IRS Rules, Rulings and the Impact on IRA Trusts
2. Nuts and Bolts of IRA Trusts
3. IRA Required Minimum Distribution (RMD) Rules and Beneficiary Designations
4. Retirement Account Rollovers: Rules, Opportunities and Pitfalls
5. Conduit vs. Accumulation Trusts
6. Drafting IRA Trusts - Avoiding Potential Pitfalls
7. Other IRA Trust Traps and Administration Issues
8. Ethical Landmines

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## SPEAKERS

**JUSTIN H. BROWN** is a shareholder of Flaster Greenberg PC's trusts and estates, taxation, and business and corporate practice groups. He focuses his practice on estate and tax planning, estate and trust administration, and estate litigation. Mr. Brown is admitted to practice in New Jersey, Pennsylvania and Maryland; and before the U.S. District Court for the District of New Jersey; and the U.S. Tax Court. He is a member of the American, New Jersey State, Pennsylvania, Maryland State, Philadelphia (Education Committee; Probate and Real Property Section), and Camden County bar associations. Mr. Brown also is a member of the Philadelphia Estate Planning Council, and the Estate and Financial Planning Council of Southern New Jersey. He earned his B.A. degree, with honors, from Washington University in St. Louis; his J.D. degree, cum laude, from American University Washington; and his LL.M. degree from Villanova University School of Law.

**ROBERT F. BROGAN** is president of the Brogan Law Group, a boutique practice focused exclusively on elder law, special needs planning, and asset protection. Certified as an elder law attorney by the ABA-accredited National Elder Law Foundation, Mr. Brogan presently serves as a director on the Board of Directors of the Special Needs Alliance, an invitation-only national consortium of attorneys dedicated to special needs and disability law; and serves as co-chair of the Special Needs Alliances' Public Policy Committee. Mr. Brogan served as a director on the Board of Directors of the National Academy of Elder Law Attorneys (NAELA). He also served as chapter president of the New Jersey NAELA. Mr. Brogan was chair of the Elder and Disability Law Section of the New Jersey State Bar Association. He is a member of the Council of Advanced Practitioners (CAP), an invitation-only council comprised of innovators in the profession guiding the future of elder and special needs law. Mr. Brogan served as chair of the Ocean County Bar Association's Elder Law Committee. He is admitted to practice in the Superior courts of New Jersey, the Federal District Court of New Jersey, and the United States Third Circuit Court of Appeals. He serves on the Public Policy Steering Committee of NAELA and was selected by the NAELA president to chair the ABLE Act Task Force. The New Jersey State Bar Association has twice awarded him the Legislative Service Award for his lobbying efforts in the fields of elder law and special needs. He was an adjunct professor of law at the Georgetown University Law Center. He regularly lectures to other attorneys at the state and national level regarding Medicaid planning, planning for people with special needs, and the policy impact of healthcare issues on seniors and those with special needs. He has lobbied for positive legislative and regulatory developments on behalf of seniors and those with special needs at the state, Congressional and Presidential level. He is the author of articles published by *New Jersey Lawyer Magazine*, the New Jersey Institute for Continuing Legal Education, Suffolk University School of Law, National Business Institute, the Special Needs Alliance, and the National Academy of Elder Law Attorneys. Mr. Brogan earned his B.A. degree in journalism from Rutgers College and he earned his J.D. degree from Rutgers School of Law.

**BRIAN W. DONNELLY** is an attorney and managing member of Donnelly Ritigstein Law Offices, a boutique estate and corporate services firm servicing clients in New Jersey, New York and Pennsylvania. He is listed in the *Bar Register of Pre-eminent Attorneys* and has been quoted in *U.S. News and World Report*. Mr. Donnelly has repeatedly been selected for inclusion in *Super Lawyers* as a Rising Star. He was included in the 2010 Legal Elite List for *Smart CEO Magazine* and was a finalist in its 2015 CPA and ESQ. Awards. Mr. Donnelly focuses his practice on business and estate planning and litigation, and acts as outside counsel to several large closely-held multi-million dollar companies. He holds and LL.M. degree in taxation from Temple University, with certifications in estate and gift taxation. Mr. Donnelly is a 22 year veteran of the armed

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forces. He is a former Marine and, after 9/11 was mobilized at the Pentagon, where he led investigative teams prosecuting terrorists under Iraqi law.

### registration

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### CLE Credits

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