Tax Reform Seminar Series, Part VIII: Estate Planning Considerations for Retirement Assets

June 13, 2019

TAX REFORM SEMINAR SERIES

EFFECTIVE STRATEGIES TO TAKE ADVANTAGE OF THE TAX CUTS & JOBS ACT

PART VIII: Estate planning considerations for retirement assets

Retirement assets comprise a significant portion of most clients' estates. Learn some of the planning considerations and techniques to maximize the benefit of this asset class. The seminar will focus on:

- Highlights of the SECURE Act just passed by the House
- Special issues for minor beneficiaries
- Pitfalls in naming trusts as the beneficiary of retirement assets
- Paying retirement assets to a special needs trust
- How to deal with taxes attributable to retirement assets
- Self-directed IRAs
- Roth IRAs and "Backdoor" Roth IRAs
- Using retirement assets for charitable giving

Speakers:

- **Jonathan Ellis**, Shareholder, Trusts & Estates and Business & Corporate Departments, Flaster Greenberg PC

- **Marc Miller**, Attorney, Trusts & Estates and Business & Corporate Departments, Flaster Greenberg PC

Date & Time:

Thursday, June 13, 2019
Registration and Networking: 8:00 – 8:30 a.m.
Seminar and Q&A: 8:30 – 10:00 a.m.

Location:

Flaster Greenberg PC
1810 Chapel Ave West
Cherry Hill, NJ 08002

Credits:

Attorneys: 1.5 substantive Pennsylvania CLE credits (NJ reciprocal)
CPAs: 1.5 PA and NJ CPE credit

ATTORNEYS MENTIONED

Jonathan Ellis

E. Marc Miller