

*Join us for*

## **DISPOSITION OF QUALIFIED PLANS & IRAS**

### **1.0 CPE CREDIT**

Provided by Approved Program Sponsor

*State Board of Accountancy - Bureau of Professional and Occupational Affairs*

#### **SPEAKER**



**James A. Ritter, Esq.**

Jim concentrates his practice in the areas of estate planning and administration. In many cases, Jim has counseled his clients and their families for multiple generations, keeping them up-to-date on new estate laws and offering the comfort of knowing that they are prepared for the future.

The majority of adults who are investing for their retirement are now using qualified plans as well as pre- and post-tax IRA accounts. Baby Boomers are expected to transfer some \$30 trillion in assets to their heirs over the next 30 to 40 years and their largest financial holdings are located in 401(K) plans. These types of accounts require particular estate planning considerations and can present unique problems in the estate planning and administration process.

Join us for this one-hour credited seminar, during which we will take an in-depth look at retirement accounts and the “red flags” that could pose particular challenges for your clients. Discussion will include taking maximum advantages for spouses as well as using see-through trusts and conduit trusts for minor and/or disabled beneficiaries. Example scenarios will offer a real-world look at how qualified plans and IRAs are handled in the estate planning/administration process.

## **Tuesday, May 23**

OFFICES OF GROSS MCGINLEY, LLP  
**33 S. 7th Street, Allentown, PA**  
FREE PARKING

7:45am Registration  
8:00am to 9:00am Program

#### **CPE Information**

Basic Level

No Prerequisites

Subject: Specialized  
Knowledge and  
Applications

We are offering this seminar free of charge. However, space is limited.

Please complete and return the attached Registration Form by **Friday, May 12th** to Maddy Miller by fax to (610) 820-6006 or by email to [mmiller@grossmginley.com](mailto:mmiller@grossmginley.com).

For more information, please call (610) 820-5450.



*Registration Form*

# DISPOSITION OF QUALIFIED PLANS & IRAS

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5.23.17

NAME: \_\_\_\_\_

TITLE: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

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PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

- Please add my email address to your mailing list  
for future seminars and legal updates.

Please fax/email/mail before **Friday, May 12th** to:

Maddy Miller, Director of Business Development & Marketing  
Gross McGinley, LLP  
33 S. Seventh Street  
P.O. Box 4060  
Allentown, PA 18105-4060  
(610) 820-6006 fax  
mmiller@grossmcginley.com