

Chamberlain, Hrdlicka, White, Williams & Martin

COBB GALLERIA AREA TAX FORUM

June 10, 2009 – From 7:15 – 9:00 A.M.

COBB GALLERIA CENTRE

Ballroom A, Two Galleria Parkway, Atlanta, Georgia 30339

"IS IT TIME TO TRUST YOUR IRA BENEFICIARY? A DISCUSSION OF THE ISSUES RELATED TO DESIGNATING A TRUST AS THE BENEFICIARY OF YOUR RETIREMENT ACCOUNT"

Every day, Americans are allocating a larger portion of their savings to qualified retirement plans and individual retirement accounts. As these types of accounts grow, so does the need to protect them for the benefit of the participant's beneficiaries from taxation, divorce and creditors' claims. Therefore, it has become increasingly more important for the participant's estate planning advisers to understand the rules which govern the transfer of these accounts to trusts when planning for the participant's death. Unfortunately, these rules are numerous, confusing and very costly if violated. The purpose of this outline is to review many of the issues, benefits and potential pitfalls involved in the transfer of a deceased participant's retirement account to a trust for the benefit of his or her spouse and/or children.

Speakers

J. Scot Kirkpatrick and Rose K. Drupiewski

(Two hours of CPE credit for CPA's recommended to State Board for attendance at this Forum)
(CLE and CFP Credit is now being requested)

_____ Yes, I will attend the Cobb Galleria Area Tax Forum on June 10, 2009.*

\$40 PAYMENT ENCLOSED _____
(per person)

\$42 WALK-IN WITH NO RESERVATION _____
(per person)

My Name: _____

E-Mail Address: _____

My guest(s) will be: _____

VISA ____ MC ____ AMEX ____ Number: _____

Exp. Date: _____ Signature: _____

RETURN TO: Mary Beth Caracciolo, Tax Forum Coordinator
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OR FAX: 713-356-1001/713-658-2553
OR CALL: 800-342-5829
OR E-Mail: marybeth.caracciolo@
chamberlainlaw.com

*Since we guarantee your reservation \$40 will be billed if you cancel your reservation later than two (2) days prior to the meeting or make a reservation and do not attend. Payment may be made by cash, check, Visa, MasterCard or American Express.