

CHAMBERLAIN, HRDLICKA, WHITE, WILLIAMS & MARTIN

NORTHWEST AREA TAX FORUM

June 18, 2009 – From 7:15 to 9:00 A.M.

NEW LOCATION ► HILTON GARDEN INN

Houston Northwest – Parking around back, meeting room entrance in rear
7979 Willow Chase Blvd., Houston, TX 77070
(249 & FM1960, North feeder, right turn just before Methodist Hospital)

"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

Brett T. Berly and Carol Ina Cooper

*(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 Northwest Area Tax Forum on June 18, 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
Chamberlain, Hrdlicka, White, Williams & Martin
1200 Smith Street, Suite 1400
Houston, Texas 77002

OR FAX: 713/356-1001 (desktop) or 713/658-2553
OR CALL: 713/658-2500
OR E-Mail: marybeth.caracciolo@chamberlainlaw.com

* Since we guarantee your reservation, you will be billed \$40.00 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.

If you are unable to attend the Northwest Area Tax Forum, please consider joining us at one of the following locations:
West Loop Area Tax Forum – The Houstonian – June 10, 2009
West Houston Area Tax Forum – Lakeside Country Club – June 24, 2009

