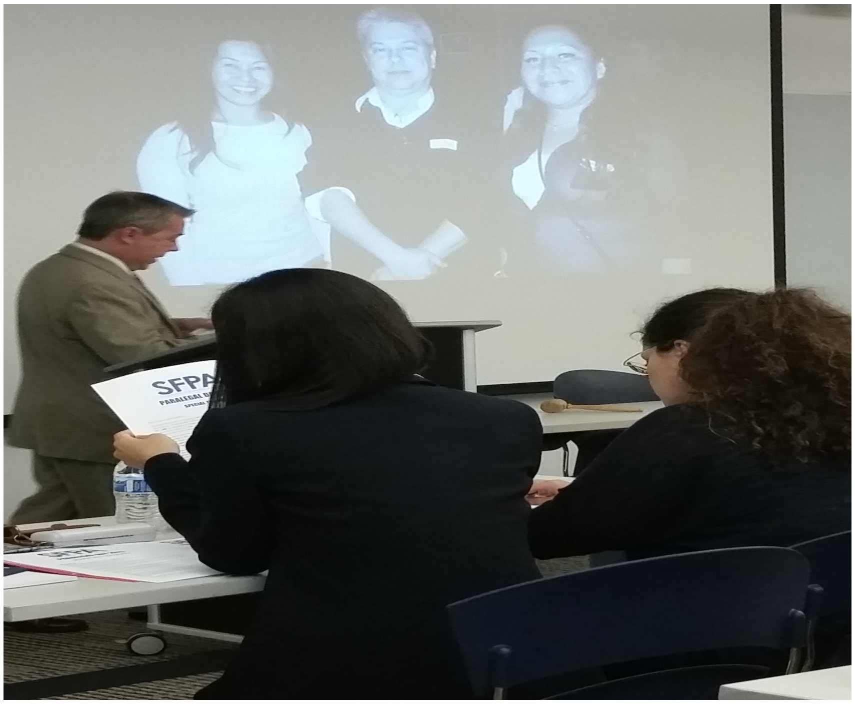
SFPA
SAN FRANCISCO PARALEGAL ASSOCIATION

TRUSTS & ESTATES PRACTICE SECTION



Date:
Tuesday, 7/17/2018

Time:
12:00 P.M. – 1:00 P.M.

Location:
San Francisco State University Downtown Campus
835 Market Street, 6th Floor
San Francisco, California

NAMING A TRUST AS THE BENEFICIARY OF A RETIREMENT ACCOUNT

(1 California MCLE general credit hour offered.)

Harry B. Maring, Esq.

In naming a trust as the beneficiary of the retirement account, we will answer the following questions: (1) Do I have a designated beneficiary? (2) What is the Applicable Distribution Period and the Required Minimum Distribution? (3) What is a see through trust, a conduit trust and an accumulation trust? (4) Do I have contingent or successor beneficiaries? (5) What if I have a charity or really old beneficiaries? (6) What about the Roth?

Cost: No charge to SFPA Members | No charge to SFSU Students/Affiliates | $25.00 to Non-Members

Please make reservations at **www.SFPA.com**.

Please contact Dalia Liang Moore at **dalia.liang@gmail.com** if you have any questions.