

You're Invited!

Estate Planning with IRAs

BAIRD

Private Wealth
Management

Coordinating a client's estate plan with their retirement account can create drafting challenges. Unfortunately, tax law changes and IRS revenue rulings have not simplified the beneficiary designation planning process. Furthermore, each IRA custodian may have a different set of policies and default provisions that may limit your beneficiary planning options or post-mortem planning techniques.

Come learn about the underpinnings for providing clients with guidance on these issues to achieve the most favorable result for beneficiaries.

These classes have been approved for two credit hours each.

Tuesday, September 29, 2015

11:30 a.m. – 1:30 p.m. Presentation and Q&A
Lunch will be served.

—OR—

Wednesday, September 30, 2015

7:30 a.m. – 9:30 a.m. Presentation and Q&A
Breakfast will be served.

Baird

3875 Embassy Parkway, Suite 300
Akron, OH 44333

Hosted By:

Paula R. Chesser and the Baird Akron Office

R.S.V.P. to Katy Kapas by Friday, September 25
at [330-664-5500](tel:330-664-5500) or kkapas@rwbaird.com and indicate which
session you will be attending.



Scott Grenier, CFP®, AEP®
Senior Estate Planner
Baird