EVERYTHING YOU NEED TO KNOW ABOUT THE SECURE ACT

Presented by
Craig Wisnom, Bogutz & Gordon

Description:
This program will cover the recently passed Secure act, and its drastic change on estate planning related to IRA’s and other retirement plans. The presentation will discuss the changes that have been enacted and how they impact your clients and existing plans.

Key topics include:
- SECURE Act—What You Should Know
- Required Distribution Regime prior to Secure Act
- Key Changes from SECURE Act
- Explaining the unexpected complexity in the new rules
- Lifetime Benefits
- Post Death Downsides
- Practical Planning under the Secure ACT

Date:
Tuesday, MARCH 10, 2020

Time:
10:00 AM - 12:00 PM

Location:
PCBA OFFICE
177 N. CHURCH AVE., #101
TUCSON, AZ 85701

Coordinated by:
Jodi Bernstein

Please clip the registration form below and mail with payment to: PCBA 177 N. Church Ave., #101 Tucson, AZ 85701
Or fax registration forms with credit card payments to 520-623-9772.*
*It is recommended that all faxed registrations be confirmed by phone at 520-623-8258.

Registration Form
Check One:  □  PCBA Members $50  □  Non-Members $100

Name

Check #________

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Credit Card #

Phone  E-Mail

Exp. Date

Billing Address (Must include with card)  Billing Zip Code

Signature

Space is Limited!  03/10/20

Secure Act

NOTE:
Registration can be received up to the time of the seminar, however any registrations received after the Monday preceding the seminar are considered “late” and subject to a $10 late fee. There are no refunds after that date.