



Michael J. Jones – *Thompson Jones LLP*

Planning with Retirement Plans

Many clients hold significant amounts of wealth in their retirement plans, which can complicate standard revocable trust planning recommended by advisors. Planning and administration for clients with significant retirement plans presents unique opportunities and challenges.

Mike Jones will join the SFEPCC to discuss:

- Planning for entitlement to death benefits during lifetime
- Determining entitlement to death benefits after death
- Trusts as beneficiary of retirement benefits
- IRA rollover by a surviving spouse
- Required minimum distributions after death of spouse

Michael J. Jones, CPA is a partner in Thompson Jones LLP, Monterey, California. His tax consulting practice focuses on estate planning and administration of retirement benefits, sophisticated wealth transfer strategy, trust and probate matters (both administration and controversy resolution), and family business transitions.

Mike is the author of three books, including *Inheriting an IRA*. He has written over 160 published articles. Mike serves as Chair of Trusts and Estates magazine's Retirement Benefits Committee. He has been quoted in *New York Times*, *Forbes Magazine*, *The Wall Street Journal*, Ed Slott's *IRA Newsletter*, *Bloomberg Financial Report* and others.

Mike has served as adjunct faculty at Santa Clara Law School, and has spoken extensively for the Jerry A. Kasner Symposium, Southern California Tax & Estate Planning Forum, Hawaii Tax Institute, American Institute of CPAs, New York University's Tax Institute, California CPA Education Foundation, and others.

Mike is an avid prone paddleboarder and surfer.

Join us on **Wednesday, January 23, 2019** at 5:30 PM
at the Omni Hotel - 500 California (at Montgomery) in San Francisco.

\$75 Preregistered Members

\$95 Preregistered Guests

At the door – Registrations still needed - \$80 members and \$100 guests

Reservation needed by January 21, 2019

Send a check with names to: SFEPCC – 767 Brannan Place – Concord, CA 94518

Or pay by credit card – <http://www.123signup.com/calendar?org=sfepcc>

If you or your guest requires a vegetarian meal, please send an email to: sfepcc@astound.net

Continuing Education Credit:

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California.

CPA & CFP®: A sign-in sheet and an attendance certificate are provided at each meeting.

Excused Absence:

Members can request an excused absence by mailing a letter or sending an email (sfepcc@astound.net) to the Council Office prior to the meeting. Please address the letter to the Board of Directors.