San Francisco Estate Planning Council

Note Location: The Omni Hotel
500 California, San Francisco

Bryan D. Kirk
Stanford University
Ryan Szczepanik
BNY Wealth

Trust and Estate Planning for Retirement Accounts

Please join us for the next SFEPC meeting on **November 20, 2024.** We are back at **The Omni Hotel in San Francisco** this month. We will be meeting at **5:00 pm for a social hour** with hors d'oeuvres and cocktails, followed by our featured speakers, **Bryan Kirk and Ryan Szczepanik at 6:00 pm.**

This presentation is intended as a practical overview for advisors helping individuals make decisions about to whom they leave their retirement accounts.

We will address the importance of trust and estate planning for retirement accounts and provide a basic overview of lifetime planning for those accounts. We will then review the rules on required distributions from inherited IRAs. Finally, we'll focus on the transfer planning decisions individuals are likely to need to make in relation to their retirement accounts and concerns that may arise based on those decisions.

Bryan D. Kirk is currently Development Legal Counsel for Stanford University. He is a Fellow of the American College of Trust and Estate Counsel and certified specialist in Estate Planning, Trust and Probate Law. Bryan enjoys working with individuals, families and charitable institutions on issues related to philanthropy and estate planning. He regularly writes and presents on these topics, including publications in *Trusts & Estates*, *Estate Planning*, and *Journal of Financial Planning*. Prior to joining Stanford, he led estate and financial planning for Fiduciary Trust International and practiced trust and estate law in Northern California. He is a graduate of U.C. Berkeley School of Law (2004, J.D.), Santa Clara University's Jesuit School of Theology (2022, M.T.S.) and Claremont McKenna College (2000, B.A.).

Ryan Szczepanik is a Senior Wealth Strategist at BNY Wealth. He works closely with families, corporate executives, business owners, charitable institutions, and their advisors to provide comprehensive trusts, estates, and tax planning services. Ryan is a certified specialist in Estate Planning, Trust, and Probate Law. He is a Member of the Executive Committee of the Trusts and Estates Section of the California Lawyers Association (TEXCOM). Before joining BNY Wealth, Ryan was a Shareholder at the Bay Area trusts and estates law firm Hartog, Baer & Hand. Ryan is a graduate of Emory Law School (2003, J.D.) and Amherst College (1999, B.A.), and he received a Certificate from the Harvard Law School Executive Education Accelerated Leadership Program (2019).

Join us on Wednesday, November 20, 2024
5:00 PM – 6:00 PM **Social Networking/hors d'oeuvres and cocktails**
6:00 PM – 7:00 PM **Meeting**
NOTE LOCATION FOR THE NOVEMBER MEETING:
THE OMNI HOTEL - 500 California (at Montgomery) in San Francisco

$100 Pre-registered Members - $150 Pre-registered Guests
At the door – Registrations still needed *- $125 members and $175 guests*
Pre-Registration is Required
Reservation needed by November 18, 2024
Cancellations must be received three business days prior to the meeting.

Register Here

MCLE, CFP & CTFA: This activity may be approved for CE credit of one hour by the State Bar of California, CFP® Board & ABA.
Excused Absence: Members can request an excused absence by sending an email (info@sfepc.org) to the Council Office prior to the meeting.