

HISTORIC NEW LAW

Urgent Action Steps and Planning for Retirement Accounts under the SECURE Act

If you have retirement accounts, the SECURE Act that just went into effect January 1st will affect you and your family and could potentially undermine your estate planning goals.

Under the SECURE Act, those who you want to receive your retirement accounts will most likely be paying significantly higher income taxes and be vulnerable to creditor claims and divorcing spouses.

In this timely presentation, you will learn what you can do immediately to minimize the problems created by the new law, including:

- How to change your retirement account beneficiary to avoid all income tax
- How to best protect the assets from the claims of creditors
- How to prevent beneficiaries from wasting away their inheritance
- How to use a special charitable trust to create an income stream for your beneficiaries and minimize income tax
- How to integrate insurance into your estate plan to preserve wealth for your beneficiaries
- And more....

ESTATE PLANNING WORKSHOPS

THURSDAY: January 30th,
1:00pm-2:00pm

FRIDAY: January 31st,
10am-11am

Lerman Law Building
802 B Street, San Rafael

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Author and featured commentator on television and radio



Jeff Lerman



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Michelle does an excellent job of taking a complex topic and making it understandable by using plain English - William Bronchick, best-selling author, attorney, and host of www.legalwiz.com

Michelle C. Lerman
ATTORNEY AT LAW

Certified Legal Specialist - Estate Planning, Trust, Probate by Ca. Bd. Legal Specialization of Ca. State Bar Selected for inclusion in 2009, 2010, 2017, 2018 & 2019 Super Lawyers.*

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