

Ann Arbor Morning Update: Estate Planning Essentials

March 7, 2012

Ann Arbor/Ypsilanti Chamber of Commerce

Discussion includes the tools and techniques of effective estate planning with special emphasis on the importance of a regular review and update of beneficiary designations for IRA and other tax deferred retirement assets. An overview of the components of a thorough estate plan will be followed by a more detailed discussion on how the income taxation of retirement assets impacts the overall objectives of a family's estate plan.

This complimentary briefing is ideal for both married couples and single adults who are interested in reviewing the fundamentals of estate planning and who have savings in IRAs and/or retirement plans.

Agenda:

8:00 AM

Registration + Continental Breakfast

8:15 - 9:30 AM

Presentation

Location:

Ann Arbor/Ypsilanti Regional Chamber

115 W. Huron Street, Third Floor

Ann Arbor, MI 48104

Cost:

There is no cost to attend. Space is limited. Advance reservations required by 3.5.12.

Questions:

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