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Program Fees		
Single-course purchase:		
Three-hour course	\$ 89 per course	
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**Join us for the next course in the 2018-2019 series:**

### New Planning Strategies for Retirement Account Rollovers and Transfers

  
*Webinar Dates: Aug. 15, Aug. 23*

The rules relating to IRAs and retirement accounts generally are quite complicated, so the importance of tax professionals giving accurate advice is critical. When it comes to rollovers and transfers of IRAs and qualified plans, every word in the rules is significant. The panel of experts will take tax practitioners through this complex topic, offering planning strategies to avoid and mitigate mistakes. This program is designed for any tax professional who has clients with IRAs and qualified plans.

#### Key Topics

- Differences between retirement account transfers and rollovers
- Transferring funds from one deferred account to another
- What to do when a client inherits an IRA or qualified plan
- Avoiding the 10% penalty on certain early distributions from IRAs and qualified plans
- Roth IRA conversions, rollovers and distributions
- How to avoid and correct rollover mistakes
- Net unrealized appreciation (NUA)
- Required minimum distributions

#### Panelists

Denise Appleby, APA, CISP, CRPS, CRC  
Claudia Hill, EA  
Michael J. Tucker, CPA, LL.M. (moderator)  
*Panelists are subject to change.*

**SPECIAL OFFER:** All attendees receive a free download of Denise Appleby's 2018 IRA Beneficiary Options Quick Reference Guide.

*See details at [www.allstartax.com](http://www.allstartax.com).*

#### Details

**Course Level:** Intermediate

**CPE and IRS Credits:** Three hours

**IRS Credit Category:** Federal tax law

**CLE Credits:** Subject to state variations; visit [www.allstartax.com](http://www.allstartax.com) for your state's details.

*This course is not approved for CLE in New Mexico.*

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