THE CPE FORUM OF THE CENTRAL COAST

RSVP to Stacey Conley via e-mail at
rsvp@cpefcc.org, online at www.cpefcc.org
or by phone at (831) 624-5333

RSVP's are required no later than April 30th.

Seating is Limited – Email Your RSVP Today!

Michael Jones, CPA

Topic: **Planning for Retirement Death Benefits Under the SECURE Act.**

When: **Tuesday, May 5, 2020**
Registration begins - 11:30 am
Program will run from 12:00 pm-1:00 pm
(1 hours of CPE Credit / 1 hours of MCLE Credit)

Where: **The Community Foundation for Monterey County**
2354 Garden Road
Monterey, CA 93940

Cost: **$65.00** (includes lunch)
Please make your check payable to:
CPE Forum of the Central Coast

Who: **All members of the CPE Forum & their staff**

Prior RSVP is required! Mail payment before the meeting date to:

CPE Forum of the Central Coast
P.O. Box 222744
Carmel, CA 93922-2744

****** Please Note******
You will receive access to digital course materials once payment has been received. Course materials will not be provided in print version.

Cancellation Policy: A full refund will be issued if notification via email is received at least <u>5 business days before the event.</u>

Speaker Bio:

Michael J. Jones, CPA is a partner in Monterey, California's Thompson Jones LLP (email: mjj@tj-llp.com). His tax consulting practice focuses primarily on tax-efficient wealth transfer strategy, including planning and administration of retirement benefits during lifetime and after death. Mike is the author of four books, including Inheriting an IRA and Inheriting an IRA Professional Edition. He has written over 170 articles published in Trusts & Estates, Leimberg Information Services, Inc., Ed Slott's IRA Newsletter and elsewhere. He serves as chair of Trusts & Estates magazine's Retirement Benefits Committee and chairs the CPE Forum of the Central Coast. He has lectured across the U.S. for Jerry A. Kasner Estate Planning Symposium, Hawaii Tax Institute, Southern California Tax & Estate Planning Forum, AICPA Advanced Estate Planning Conference, AICPA Conference on Tax Strategies for the High-Income Individual, UCLA-CEB Estate Planning Institute, New York University Institute on Federal Taxation, CEB Estate Planning and Administration Annual Updates panels, and others. He has been quoted in Natalie Choate's Life and Death Planning for Retirement Benefits, Keith Schiller's Estate Planning At The Movies® — Art of the Estate Tax Return, New York Times, Forbes Magazine, The Wall Street Journal, Bloomberg Financial Report and others.

Offering the highest quality Continuing Professional Education (CPE) credits for CPAs and attorneys. This organization adheres to the regulations and requirements prescribed in the Accountancy Act of the State Board of Accountancy. This program has been approved for Minimum Continuing Legal Education credit by the State Bar of California in the amount of **<u>1 hour</u>**, (of which 0 hours will apply to legal ethics/law practice management/prevention, detection, and treatment of substance abuse and emotional distress/elimination of bias credit, as appropriate to the content of the activity); and the CPE Forum of the Central Coast certifies that this activity conforms to the standards for approved education activities prescribed by the rules and regulations of the State Bar of California governing minimum continuing legal education.