

Estate Planning for Retirement Assets

Lance Like
Like Law Group, LLC

Veterans Affairs Benefits

Mary Elftman
Veteran Service Officer, Monroe County, Indiana
December 6, 2018
Zaharakos
Columbus, Indiana

Estate Planning for Retirement Assets

- Fundamental Concepts including General idea behind retirement accounts, Required minimum distributions, “Designated beneficiary” status – why is this important, Critical dates and Separate account rules
- Who should be a “designated beneficiary”:
Spouse, Charity, Other individuals and Trusts
- Beneficiary designation myths
- Issues with trusts including, See through trust status, Conduit trusts, Accumulation trusts and Conduit/accumulation trust “switch”

Veterans Affairs Benefits

- Service-Connected Disability Benefits with Special Monthly Compensation
- Dependence and Indemnity Compensation (DIC)
- Veterans Pension with Aid & Attendance and Nursing Home Care
- Survivor’s Pension with Aid & Attendance and Nursing Home Care

To register online click [here](#) or e-mail Kathleen McConahay at kmconahay@yahoo or mail it with any appropriate checks to Jessica Hidalgo, Blue & Co., 813 West 2nd Street, Seymour, IN 47274.

REGISTRATION INFORMATION

Please register me for the seminar on December 6, 2018

Name _____ Member _____ Guest* _____

Professional Designation and License Number _____

Firm or Business Name _____

Address _____

Phone _____ e-mail _____

***If the guest would like to receive ce credit, please enclose \$60.00 with the registration form and mail it to Jessica Hidalgo at the above address.**