

Ivins Attorneys Speak at DC Bar on Estate Planning with Retirement Plan Assets

ATTORNEYS

Douglas M. Andre

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PRACTICE AREAS

Estate Planning

Qualified Retirement Plans

Wealth Planning

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On December 15, 2011, three Ivins attorneys, Victor Chang, Matie Little and Douglas Andre, presented at a DC Bar, Taxation Section, Estate Planning Committee luncheon in Washington, DC on the topic of Estate Planning with Qualified Retirement Plan Benefits. The "all-Ivins" panel discussed income and estate tax issues regarding qualified plan assets, and they detailed the key issues for advising clients who have significant assets in qualified plans. These included how plan beneficiaries can maximize income deferral, how to design trusts to receive plan assets and how to incorporate qualified plan assets into clients' wealth succession plans.