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Live 2.1-Hour November 15, 2006 Presentation

STEVEN G. SIEGEL

# PENSION PROTECTION ACT OF 2006: WHAT TAX AND ESTATE PLANNERS NEED TO KNOW

## EXTREMELY USEFUL!

“Excellent, practical description of what this legislation means to me and my clients. Very, very useful!”

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The massive Pension Protection Act of 2006 (“PPA”) contains many provisions which are *critically important* to tax and estate planners and their clients. In addition to the well-publicized new rules relating to Rollover of Retirement Accounts By Non-Spouses, the PPA includes *big changes* in the valuation penalties, charitable deduction incentives and limitations and more.

This 2.1-hour November 15, 2006 valuable explanation goes through all of the PPA provisions tax and estate planners need to know.

In this important program, Mr. Siegel gives you:

- ▶ a step-by-step practical explanation of the relevant provisions
- ▶ useful planning tips
- ▶ warnings about traps and pitfalls

This “how-to” practitioner-oriented program will give you the knowledge you need to properly advise clients about this important topic.

### COMPLETE TABLE OF CONTENTS

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## TOPICS

- ✓ Rollover Of Retirement Accounts By Non-Spouse Beneficiaries – BIG!
- ✓ Increased Valuation Penalties – BIG! 
- ✓ Direct Distributions To Charities From IRAs
- ✓ Direct Rollovers From Retirement Plans To Roth IRAs
- ✓ Direct Deposit Of IRS Refunds
- ✓ Scheduled 2010 Sunset Eliminated
- ✓ Liberalized Withdrawal Rules
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STEVEN G. SIEGEL is president of The Siegel Group, Morristown, New Jersey, a national consulting firm providing tax and estate planning advice to individuals and businesses. Mr. Siegel holds a BS from Georgetown University, a JD from Harvard Law School and an LLM in Taxation from New York University. He is the author of several books, including *The Estate Planning Course Book*. Mr. Siegel is a nationally-recognized writer and speaker who has lectured extensively throughout the United States on tax, business and estate planning topics.

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## PENSION PROTECTION ACT OF 2006

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