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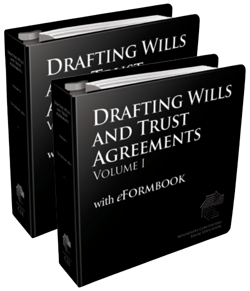

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COURSE INFORMATION

LIVE IN PERSON
Wednesday, August 26, 2026
Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370
Third Floor City Center, Minneapolis

ONLINE REPLAY
Friday, September 11, 2026
Tuesday, September 29, 2026
View online at www.minncle.org
A moderator will be available to answer questions by email.

HOW TO REGISTER
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Practical Guidance for Better Results!

THE ESTATE PLANNER'S GUIDE TO
Retirement Accounts & Social Security Benefits

Wednesday, August 26, 2026 – Attend In Person

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Practical Guidance for Better Results!

THE ESTATE PLANNER'S GUIDE TO

Retirement Accounts & Social Security Benefits

Essential Strategies and Tips to Optimize Assets

Retirement accounts and Social Security benefits are riddled with complex rules, critical deadlines, and costly pitfalls. Estate planning attorneys must be familiar with these assets and rules to tactically incorporate them into estate plans.

OUR FACULTY WILL DISCUSS:

- Integrating **Retirement Accounts** into an Estate Plan
- Complying with **Required Minimum Distribution (RMD)** Rules
- Understanding the **SECURE Act**
- Answering Your Tough Questions on **Social Security Benefits**
- Planning for **Medical Assistance Eligibility**
- And more!

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SCHEDULE

8:30 – 9:00 a.m.
CHECK-IN & CONTINENTAL BREAKFAST

9:00 – 9:05 a.m.
WELCOME & ANNOUNCEMENTS

9:05 – 9:50 a.m.
Coordinating Retirement Accounts in Estate Planning
Successfully coordinating your client's assets to meet their retirement income needs while managing the associated tax consequences can improve both their retirement security and the legacy they leave behind. This session will help you better understand how your client's assets are used throughout retirement and how they ultimately transfer to their heirs.
– *Bill Meyer*

9:50 – 10:20 a.m.
4 Key Tips for Naming Beneficiaries for Retirement Accounts
This session will provide tips and best practices for naming primary and contingent beneficiaries on retirement accounts. Topics will include:
- Naming a spouse as the beneficiary
- Naming children as beneficiaries
- Naming a spouse and another beneficiary
- Choosing alternate beneficiaries

– *Amanda N. Juelson*

10:20 – 10:30 a.m. BREAK

10:30 – 11:45 a.m.
Answers to Tough Questions About the Intersection of Social Security Benefits, Retirement Planning and Estate Planning
For many clients, Social Security benefits play an important role in their overall retirement plan. This session will provide an overview of Social Security, including retirement benefits for the worker, spousal benefits and survivor benefits, and give helpful guidance for advising clients on retirement decisions and estate planning.
– *Brian Rudolph*

11:45 – 11:50 a.m. BREAK

11:50 a.m. – 12:20 p.m.
Retirement Accounts and Their Impact on Medical Assistance Eligibility
Careful estate planning is required to ensure retirement accounts don't count as an available asset and affect a client's Medical Assistance eligibility. This session will provide an overview of the Medical Assistance rules as they pertain to retirement accounts and discuss practical tips for advising your clients on their best course of action under common circumstances
– *Brenna M. Galvin*

12:20 – 1:00 p.m. LUNCH (on your own)

1:00 – 2:00 p.m.
SECURE Act: Rethinking Estate Planning with Retirement Accounts
This session features an updated analysis of the continued impact of the SECURE Act on post-death distributions from qualified retirement accounts and will explore various planning strategies and options to effectively structure these distributions for your clients.
– *Bryan Jamison*

2:00 – 2:05 p.m. BREAK

2:05 – 2:50 p.m.
Navigating the Required Minimum Distribution (RMD) Rules
Funds held in retirement accounts cannot be kept there indefinitely. The required minimum distribution (RMD) is the minimum amount you must withdraw from your accounts each year once you reach a certain age. This session will cover:
- When withdrawals must begin
- How to calculate the RMD
- The withdrawal rules and penalties for failing to comply
- A summary of the SECURE Act's impact on retirement plans

– *Derek M. Dockendorf*

2:50 – 3:00 p.m. BREAK

3:00 – 4:15 p.m.
Strategies for Including Social Security and Retirement Benefits in an Estate Plan – A Scenario-Based Discussion
Join a panel of experienced estate planning attorneys in this scenario-based session as they discuss what planning they would recommend for various circumstances. Learn advanced estate planning tips and explore what strategies may help your clients maximize their assets.
– *Bryan Jamison*
Amanda N. Juelson
Bill Meyer
– *James T. McNary, moderator*

FACULTY

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Bravura Group P.C.
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Jamison & Jamison, P.A.
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McNary Law Office, P.A.
Red Wing

Bill Meyer
Ameriprise Financial Services, LLC
Minneapolis

Brian Rudolph
Social Security Administration
Saint Paul

Register today at www.minncle.org

THE ESTATE PLANNER'S GUIDE TO
Retirement Accounts & Social Security Benefits

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