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Please reply no later than Friday, November 9, 2018

Topic:

Annual Update: Federal Transfer Taxes; Retirement Benefits

Speaker: **Michael J. Jones, CPA**

When: **Tuesday, November 13, 2018**
Registration begins - 11:30 am
Program will run from 12:00 pm-1:00 pm
(1 hour of MCLE/CPE Credit)

Where: **Corral de Tierra Country Club**

Cost: **$55.00, includes lunch**

Please make your check payable to:
CPE Forum of the Central Coast

Prior RSVP is required, please mail payment before the meeting date to:

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

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

Speaker Bio:

Michael J. Jones, CPA is a partner in Monterey, California's Thompson Jones LLP (www.thompsonjones.com). His tax consulting practice focuses on tax-efficient wealth transfer strategy, maximizing the value of inherited retirement benefits, trust and probate tax matters (both administration and controversy resolution), and family business transitions. 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, WealthManagement.com, Leimberg Information Services, Inc., Ed Slott's IRA Newsletter and elsewhere. He serves as chair of Trusts & Estates magazine's Retirement Benefits Committee and the CPE Forum of the Central Coast. He has lectured across the U.S. for Jerry A. Kasner Estate Planning Symposium; Southern California Tax & Estate Planning Forum, Hawaii Tax Institute, 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, and Bloomberg Financial Report. Mike is also a musician, avid prone paddleboarder, and surfer.

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