



10 STRATEGIES FOR PASSING ON RETIREMENT ASSETS WHEN YOUR CLIENTS PASS ON

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Author: Douglas H. Olin

In this presentation, Douglas H. Olin, a trusts and estates attorney with Cummings & Lockwood, discusses 10 strategies for managing retirement assets. Specifically, he discusses beneficiary designations and incorporating them into the estate plan to ensure consistent treatment with other assets, such as retirement plans, insurance, employee benefits, TOD accounts, etc. (16:48)

Presentation Outline

1. Lifetime distributions to charities
2. Roth conversion
3. Charities as beneficiaries
4. Descendants as beneficiaries
5. Trusts for descendants as beneficiaries
6. Spouse as a beneficiary
7. Trust for spouse as a beneficiary
8. Combination of individuals and charities as beneficiaries
9. Estate tax apportionment
10. Changes on the horizon?

