



OF MICHIGAN



Five Organizations Come Together To Present

**“Retirement Planning in the Shadow of the SECURE Act”**

CFP CE 1 Credit Hour, Duration 55 Minutes

**Tuesday, April 21, 2020**  
**Ruth Flynn Raftery**  
**JD, CPA, AEP®**  
**Jeffrey R. Hoenle**  
**CFP®, CRPC®, AEP®**



**St John Banquet and Conference Center of Southfield**  
**(PLEASE NOTE NEW VENUE!)**  
**22001 Northwestern Hwy., Southfield, MI 48075**

*Presentation Outcomes:*

- *Sweeping changes in qualified plans through the recently passed SECURE Act requires planners to aid their clients to quickly optimize their IRA and Roth IRA assets. Additionally, SECURE greatly impacts employer retirement plans and retirement decision.*
  - *This session will help you educate your clients on planning opportunities*
- *What’s the presentation take-away?*
  - *This session covers the elements of the SECURE Act relevant to income, tax and estate planning as well as key related elements of the Tax Cuts and Jobs Act of 2017.*
- *Why should you attend this event?*
  - *To learn an 8-step planning process focused on optimizing retirement accounts. Learn about the various analyses’ that should be considered and the planning opportunities available.*

|                |                                 |   |
|----------------|---------------------------------|---|
| <b>AGENDA:</b> | <b>10:30 a.m. – 11: 15 a.m.</b> | <b>Registration &amp; Optional Networking</b> |
|                | <b>11:20 a.m.</b>               | <b>Buffet Lunch</b>                           |
|                | <b>11:30 a.m. – 12:30 p.m.</b>  | <b>Presentation – Q&amp;A</b>                 |

Log onto our website by April 10 to make your reservation and pay with VISA or Master Card.  
[www.metrodetroitfepc.org](http://www.metrodetroitfepc.org)

OR PLEASE MAIL YOUR RESERVATION AND CHECK BY April 10 TO: **COST: \$15.00 PER PERSON**  
FEPCCMD • 33006 W. Seven Mile Road, #237 • Livonia, MI 48152  
Phone: (313) 530-9223 • Fax: (248) 479-0350

MEMBER NAME: \_\_\_\_\_ COMPANY NAME: \_\_\_\_\_  
GUEST NAME: \_\_\_\_\_ TOTAL ENCLOSED: \_\_\_\_\_