# How Best to Inherit Proceeds From Retirement Plans Specifically for Retirees

**Date:** March 8, 2017

**Time:** 1:00 - 2:30 p.m.

**Where:** Skidmore College
Upper Level - Dining Hall

**Presented by:** David K. Carboni, Ph.D., CFP

One of the last opportunities for significant wealth transfer left to the middle class is the inheriting of retirement plans.

These plans include: employer provided defined contribution plans, i.e., 403b plans and 401k plans; Traditional IRAs; Roth IRAs; as well as a variety of other retirement plans.

This session will review the rules associated with "required minimum distributions" from retirement plans, and how best to inherit retirement plans and how to avoid common pitfalls. Much of the planning here will occur "post mortem", so it's imperative to communicate these strategies with those who will inherit the plans.

RSVP by February 22, 2017

To register for the program, contact Terri Mariani in Human Resources at 580-5804, via email tmariani@skidmore.edu