

**GREATER NEW JERSEY  
ESTATE PLANNING COUNCIL**  
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**CPE Program Notification Form for CPA's Seeking Credit**

**Program Title:** What's New in Retirement/Distribution Planning  
And Roth IRA's for 2017 and Beyond....Using Trusts  
With Retirement Plan Assets

**Presentation Date:** October 18, 2017

**Location:** Bacari Grill  
Washington Township, NJ

**Starting Time:** 8:00 a.m.

**Ending Time:** 10:15 a.m.

**Instructor:** Leonard J. Whitman, Esq.

**Format:** Live Lecture

**Program Level:** Intermediate

**Description of Program:** Estate/Retirement Planning

**Learning Objective:** Estate/Retirement Planning

**Requisite Knowledge  
And Experience:** None

**Advance Preparation:** None

**Topic Area(s):** Estate/Retirement Planning

**Total CPE Hours  
To Be Earned:** 2.0 Credits