

## **SOUTH CENTRAL CHAPTER**

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

# **Planning During Retirement**

**Thursday, November 21, 2024**

### **Camp Hill Corporate Center**

*(Formerly Deloitte Building)*

300 Corporate Center Dr.

Camp Hill, PA 17011

Questions: 1-800-270-3352

**Registration & Breakfast: 7:30 AM**

**CPE: 8:00 AM—12:00 PM**

*Assorted breakfast foods will be served*

**Speaker: James F. Tice, EA**

**CPE: 4 hours Federal Tax**

**Registration Deadline: 11/16/2024**

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NAME: \_\_\_\_\_ ID # \_\_\_\_\_ PTIN # \_\_\_\_\_

Street Address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_

**MEMBER (\$55)**    **STAFF (\$60)**    **NON MEMBER (\$65)**    **STUDENT: Free**

Check made payable to: SOUTH CENTRAL CHAPTER PSTAP is enclosed.\*\*

Credit Card: \_\_\_MC \_\_\_Visa/Amex Acct # \_\_\_\_\_ Exp: \_\_\_\_\_

Signature: \_\_\_\_\_ CVV#: \_\_\_\_\_

Register online with credit card at [www.pstapcpe.com](http://www.pstapcpe.com)

**Mail form to: PSTAP Executive Office Attn: SOC Chapter Meeting  
150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011  
FAX: 717-614-8663 Questions?: 1-800-270-3352**

**\*\* Please make checks payable to: SOUTH CENTRAL CHAPTER PSTAP  
Separate check requested for each event. Please do not combine meeting and seminar fees.  
No Shows are Ineligible for Refunds — All topics are Subject to Change.**

## **Planning During Retirement Course Description:**

This program will cover the essentials of employer retirement plans. We'll cover IRA distributions, conversions, and rollovers, and how this will interplay with Social Security benefits. We will review SECURE ACT 2.0 changes to required minimum distributions and Inherited IRAs. We will discuss alternative advanced distribution approaches under 72(t) Substantially Equal Periodic Payments ("SEPP") and Net unrealized Appreciation ("NUA"). We'll examine strategies to avoid traps in the IRA area including prohibited transactions, excess contributions, and impermissible investments.

## **Speaker Bio:**

Mr. James Tice is a leader in the firm's tax practice. He specializes in organizing, preparing, and supervising complex tax planning and compliance for various tax-exempt organizations and small businesses. He lectures on a wide range of tax, business, and ethic topics. He has been actively involved with the PA Society of Tax & Accounting Professionals since 2005, and has been enrolled to practice before the IRS since 2012.