

KING COUNTY BAR ASSOCIATION

1.00 Law & Legal CLE Credit – A/V Approval #1218177

Recorded on July 21st, 2022

Meeting Location	Date	Time	Topic
We are continuing 100% remote access meetings.	Thursday, July 21, 2022	12:00 PM to 1:15 PM	Inherited IRA SNTs: Solutions, Options & Cost Savings

AGENDA

12:00 PM Introduction

12:10 PM Presentation: 'Inherited IRA SNTs: Solutions, Options & Cost Savings', by Darryl Lynch, Investments with Oppenheimer & Co

Examines ways to preserve capital in funding, investing, and utilizing IRA SNTs:

- The tax benefits of funding SNTs with inherited IRAs under IRS private ruling
- The process of (d)4(a) transfers and the financial impact they may have on the beneficiary
- How to decide to invest or leave client assets in cash
- Examine fees, costs, and investment allocations for inherited IRA SNTs
- Receive concrete examples and templates for use in their own practices
- 7 Things to avoid as a trustee

1:15 PM Adjourn

SPEAKER BIOGRAPHY

Darryl Lynch, Investments with Oppenheimer & Co – Darryl specializes in working with guardians, conservators and trustees. He has an MBA from Duke University and has over 35 years of experience in the financial industry. Darryl recognizes the unique needs of the guardian, conservator, and trustee clients and uses a disciplined and long term approach to support them in investing and protecting their assets. Darryl has been a member of the National Guardianship Association since 2001 and is a member of the Oppenheimer Executive Council - a prestigious award to top financial advisors.

Darryl is a respected speaker on subjects related to guardianships, conservatorships and trusts. In the last three years, Darryl has delivered presentations and accredited continuing education for NGA, Stetson Law's National Conference on Special Needs Planning and Special Needs Trust, The National

College of Probate Judges, and The Special Needs Symposium. Topics have included, Fiduciary Ethics, SNT and ABLE Accounts, Sound and Prudent Investment Strategies, Limiting Liabilities for Guardians and Changes to the Guardianship Code.
