

**Probate**  
**Friday, September 29, 2006**  
2<sup>nd</sup> Floor Ballroom, Iowa Memorial Union  
University of Iowa, Iowa City, IA

- 8:00 a.m.**     **Registration**  
**8:30 a.m.**     **Legislative Update** - Sue Pence [Iowa State Bank, Iowa City]  
9:30 a.m.     Break

**Planning for Retirement Assets**

- 9:45 a.m.**     **Non Tax Aspects of Qualified Plan Distributions** – Gary Streit [Shuttleworth Law Firm]  
**10:15 a.m.**     **Required Minimum Distribution Rules** – Steve Roy [Nyemaster Law Firm]  
**10:45 a.m.**     **Trusts as Beneficiaries of IRAs** – Tom Houser [Davis Brown Law Firm]  
**11:15 a.m.**     **Update on Nonqualified Plan Rules 409A** - Gary Streit [Shuttleworth Law Firm]  
11:45 a.m.     Complimentary Lunch

**Intervivos Trusts**

- 12:30 p.m.**     **Joint Revocable Trusts** - David Repp [Dickinson Law Firm]  
**1:00 p.m.**     **Minors Trusts** - Paul Morf [Simmons Perrine Law Firm]  
**1:30 p.m.**     **Special / Supplemental Trusts** - Greg Kenyon [Bradshaw Law Firm]  
2:15 p.m.     Break  
**2:30 p.m.**     **Nonqualified Annuities** - Steve Roy [Nyemaster Law Firm]  
**3:00 p.m.**     **Dynasty / Incentive Trusts** - Paul Morf [Simmons Perrine Law Firm]  
**3:30 p.m.**     **Adjourn**