

## OCCSEA Presents Multiplex IRA Issues and Secure Act 2.0

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From: OCCSEA (info@eaoc.org)

To: ddabelstei@aol.com

Date: Monday, October 30, 2023 at 04:50 PM PDT

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## Multiplex IRA Issues and Secure Act 2.0

**\$128 Member - \$158 Non-  
Member**

Tuesday, November 21, 2023, 3:30PM - 7:30PM

Santa Ana Elks Lodge

1751 South Lyon Street

Santa Ana, CA, 92705

Join the Orange County Chapter of EA in reviewing the complex IRA Issues and the Secure Act 2.0. This class will start with charitable planning with Jim Conaway. He will discuss the charity rules for our clients with IRA's, identify what a charitable gift is,

the type of property that qualifies as a charitable contribution of ordinary income property, code section 664 and AFRS impact on usability, and much more! The next part of the class will review the Secures Act 2.0 with Jerry Sheby. He will provide a complete overview of the tax regulations pertaining to IRS. The topics reviewed will be the limits on contributions, catchup provisions for taxpayers age 50 and older, changes to the IRA distributions for RMDS and missed RMD, and much more!

IRS: WZA09-T-03417-23-I: 4 hours Fed Tax Topics.

CTEC: 1001-CE-9896: 4 hours Fed Tax Topics.

CA Bar: 3.75 hours Taxation Law

3:30 PM - Session 1 Starts

5:15 PM - Social and Networking (break)

5:45 PM - Dinner (select from Beef, Chicken, or Fish)

5:45 PM - Session 2 Starts

7:30 PM - Session 2 Ends

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Member: \$128 | Non-Member: \$158 until November 19, 2023

Member: \$138 | Non-Member: \$168 after November 19, or day of the event.

Registration: CSEA Link is open on the Learning Hub

[Register Now](#)

Since 1988 Jim Conaway has been involved with many facets of the financial services industry. Platform speaker for many diverse

communities including the American Assc of Hispanic CPA's. Having provided continuing education for EA and CPA's on a variety of topics including charitable planning. Radio show host of Smart Money Talk Radio on an NBC affiliated station.

Jerry Sheby has been involved in the financial services industry as a registered representative & an insurance agent since 1986. He became a Certified Financial Planner™ (CFP®) in 1990. He has been a member of the Los Angeles Chapter of the FPA (Financial Planning Association) since 1994 where he then served on the board of directors for the FPA as the Vice President of technology for 3 years.



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