

SEMINAR

Pensions & QDROs

Navigating divorce minefields

Increasingly, family law attorneys are faced with complex issues surrounding pensions, retirement assets, and other compensation arrangements. This in-the-trenches program offers expert guidance to assist practitioners in understanding the labyrinth of the state and federal pension system, ERISA, private retirement plans, valuation and divisibility issues, and taxes. The successful resolution of your family law case hinges on your ability to understand different types of plans and your ability to make appropriate arguments to the court concerning their treatment.

MCLE's experienced panel examines this topic in-depth. The faculty analyzes many different types of divisible benefits, including retirement benefits (e.g., benefit and defined contribution retirement plans, Massachusetts public pensions, and federal pensions); and other forms of qualified and non-qualified deferred compensation plans. The faculty also addresses important strategic decisions family law attorneys must consider when faced with dividing retirement assets. Finally, the panel offers a primer on relevant case law and drafting tips for Domestic Relations Orders, Qualified Domestic Relations Orders, and sample forms.

Agenda

- The Features of Various Executive Compensation Plans
- Public v. Private Pensions
- Transfer and Divisibility of Certain Types of Plans
- Basic Principles of Valuing and Dividing Pensions
- Qualified and Non-Qualified Deferred Compensation
- Expert Consultation and Testimony
- Drafting Tips
- Discovery Issues and Strategies
- Case Law Update
- "Ask the Experts" Q&A Session

Faculty

Jennifer A. Bingham, Esq., *Saponaro Bingham LLP, Wellesley*, Chair

Michael Foley, *Pension Appraisal Services Associates, Woburn*

Marcia S. Wagner, Esq., *The Wagner Law Group, A Professional Corporation, Boston*

William Samuel Young, Esq., *WSY Law PLLC, Roslindale*

Dates & Location

LIVE WEBCAST

Wednesday, December 9, 2020

2:00 pm–5:00 pm

Register at www.mcle.org

Program Number: 2210056WBC

RECORDED WEBCAST

December 23, 2020

9:30 am–12:30 pm

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Program Number: 2210056RBC

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 - 11-25 500
 - 26-75 1,000
 - 76-150 \$ 2,500
 - 151-250 3,500
 - 251+ 4,500