

Dividing Retirement Assets in Divorce

Strategy, tax implications and key language considerations

When people think about divorce, they often think about child support and alimony. They consider the house and their bank accounts. They think about their debts and some even consider their children's college tuition. What most forget are what can prove to be one of the biggest assets a couple has—their retirement accounts.

What type of strategy should be employed when negotiating the division of retirement accounts? What are the best ways to deal with the tax implications that arise when splitting the asset? What language should be included in the separation agreement? Join our experts as we examine these questions and more!

Agenda

- Negotiating the Division of Retirement Accounts
- Issues to Avoid When Dividing Retirement Accounts
- Division of Pensions
- Different Tax Treatment of Retirement Accounts and Why It Matters
- When a QDRO or DRO Is Necessary
- Language to Include in the Separation Agreement to Effectuate the Division of Retirement Accounts
- “Ask the Experts” Q&A Session

Faculty

Jennifer C. Roman, Esq., *Tracey, Roman & Ramos, PC, Wellesley Hills*, Chair

Nina D. Bond, CPA, CDFA, *Westborough*

Justin L. Kelsey, Esq., *Skylark Law & Mediation, PC, Southborough*

Dates & Location

Register at www.mcle.org

LIVE WEBCAST

Thursday, October 13, 2022

2:00 pm–4:00 pm

Program Number: 2230068WBC

REBROADCAST

Friday, October 28, 2022

10:00 am–12:00 noon

Program Number: 2230068RBC

REBROADCAST

Monday, November 7, 2022

12:00 noon–2:00 pm

Program Number: 2230068RB1

ON DEMAND WEBCAST

View after Monday, November 7, 2022

Program Number: 2230068WBA

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