

Events

BNA Webinar: IRAs – Alternative Investments and Other Strategies

ATTORNEYS & PROFESSIONALS

David Levine

dlevine@groom.com

202-861-5436

Richard Matta

PUBLISHED

06/17/2010

SERVICES

David Levine and Richard Matta will conduct a live webinar, “IRAs: Alternative Investments and Other Strategies,” on June 17, 2010 from 12:30 p.m. – 2:00 p.m. The BNA-sponsored webinar will focus on the various investment options and regulatory requirements involving IRAs today.

IRAs are no longer the simple retirement vehicle they were intended to be. And with more retirement assets held in IRAs than in 401(k) or pension plans, there is an ever-increasing focus on alternative uses for IRAs and IRA assets – from starting businesses to investing in vacation assets. While some uses may be permissible, many other uses may result in significant legal liability for an IRA owner. Pitfalls for the unwary include regulatory requirements – from valuation mandates to the interaction with other retirement plans. These requirements and opportunities must be analyzed in light of the removal of restraints on Roth conversions. The objectives of this webinar include providing participants with a conceptual understanding and practical application of the following:

- Roth conversions and rollovers.
- Valuation issues facing IRAs holding alternative assets.
- Potential alternative investment strategies and the basic legal risks attendant with each.
- Potential legislation introducing new IRA options.