

Please join Minto Law Group, LLC &
Wealth Management Roundtable, LLC
For a Discussion:

“The Uses and Abuses of UGMA and UTMA Accounts Established for Minors”

- Please join us as we examine the fundamentals of UGMA and UTMA accounts and discuss their differences and their common uses.
- We will analyze client situations you will likely encounter in counseling wealthy clients which may call for the establishment of such accounts.
- We will discuss whether the mandatory distributions required of these accounts makes sense when it occurs at an age when the recipient may not be able to handle the responsibility that comes with the funds – i.e. the “beer-drinking account” problem.
- We will look at some case studies where these accounts were misused and discuss how we might provide a better alternative to the client for the protection of the minor’s interests.
- We will discuss estate planning and tax implications of UTMA and UGMA accounts as well.

**Please join us Wednesday, July 28, 2010
from Noon until 1:00 p.m., at:**

*The Law Offices of the Minto Law Group, LLC
Two Gateway Center, Suite 2025
603 Stanwix Street
Pittsburgh, Pennsylvania 15222*

Please call Mary Hodges at (412) 201-5525 to register.
*Attendance is limited so please call early!
Coffee will be served with the program.*