



The OBA Family Law Section Presents

DRAFTING QDROs and BEYOND . . .

KNOW IT OR BLOW IT!



December 9, 2004 (Thursday)

December 10, 2004 (Friday)

The ZOO

OSU Tulsa

2101 NE 50th (NE 50th & ML King) 700 North Greenwood – North Hall

Oklahoma City Click below for map

Tulsa Click below for map

http://www.okczoo.com/visi_maps.htm

<http://www.osu-tulsa.okstate.edu/campusmap.asp>

6.5 CLE Hours, Including 1.0 Hour Ethics

The OBA Family Law Section is a Presumptive Oklahoma MCLE Provider. This course has been approved by the Oklahoma Bar Association Mandatory Continuing Legal Education Commission for 6.5 hours of mandatory CLE Credit, including 1.0 hour Ethics Credit.

If you need additional help with directions, e-mail Keith A. Jones at Keith.jones@lawoklahoma.com

MODERATORS: Tracy Cotts Reed, Oklahoma City, and Keith A. Jones, Tulsa

PROGRAM INSTRUCTORS are **RICHARD D. JOHNSTON, SR.**, President of **QDRO Services, Inc.**, and his son, **RICHARD D. JOHNSTON, JR.**, from **Houston, Texas**. It is a comprehensive presentation intended to provide you with most everything you should know about retirement benefits before representing someone in a divorce.

8:30 ~ 9:00	Registration – Coffee & Krispy Kremes
9:00 ~ 9:25	QDROs: What does a QDRO do; When is one required; Characteristics; Assignment
9:25 ~ 9:55	DEFINED CONTRIBUTION PLANS: Characteristics; Distribution options; Valuation date; Vesting; Discretionary employer profit sharing plan contributions; Loans; Current deferred taxation issues; Case law; Case study; Tips
9:55 ~ 10:05	Break
10:05 ~ 10:35	DEFINED BENEFIT PLANS: Characteristics; Pay status; Distribution; Valuation date; Form of Benefits; SERPs; Severance pay; Valuation issues; Case law; Case Study; Tips
10:35 ~ 11:00	CASH BALANCE PLANS: Characteristics; Distribution options; Valuation date; Case law; Tips
11:00 ~ 11:25	STOCK OPTIONS: Incentive stock options; Non-qualified stock options; Taxation issues; Valuation issues; Case law; Responsibilities & remedies; Tips
11:25 ~ 11:50	NON-QUALIFIED DEFERRED COMPENSATION PLANS: Examples; Taxation issues; Valuation issues; Case law; Tips
11:50 ~ 12:45	Lunch (box lunch provided)
12:45 ~ 1:15	FEDERAL RETIREMENT SYSTEMS: Characteristics; Distributions; Case law; Benefits; Retirement age; Thrift savings plan; Tips
1:15 ~ 1:25	Break
1:25 ~ 1:55	STATE & LOCAL RETIREMENT SYSTEMS: Characteristics; Distributions; Valuation date; Benefits; Tips
1:55 ~ 2:25	MILITARY SYSTEMS: Characteristics; Distributions; Valuation date; Active duty, Reserves, and National Guard; Case law; Survivor benefit plan; Tips
2:25 ~ 2:50	MOST COMMON MISTAKES
2:50 ~ 3:40	ETHICS

Drafting QDROs & Beyond: KNOW IT or BLOW IT Seminar

When completed, mail this Registration Form and your check payable to OBA Family Law Section to:

Keith A. Jones, 1861 E 15th St, Tulsa, OK 74104-4610

Which seminar?	<input type="checkbox"/> December 9, Oklahoma City (Thursday) <input type="checkbox"/> December 10, Tulsa (Friday)	E-mail:
Your name:	OBA #:	Address:
Your phone:	Your fax:	
<input type="checkbox"/> Postmarked or Received by 12/06/04 AND I am a member of the OBA Family Law Section. My \$115 check is enclosed, which also covers my box lunch.		
<input type="checkbox"/> Postmarked or Received after 12/06/04 OR I am not a member of the OBA Family Law Section. My \$160 check is enclosed (which also makes me a Section Member entitling me to all benefits of the Section), which also covers my box lunch.		
<input type="checkbox"/> I can't come but I want the materials. My \$60 check is enclosed.		
<input type="checkbox"/> I am an Oklahoma Appellate or District Court sitting judge. My enrollment is FREE .		