

# CONTINUING LEGAL EDUCATION

THE BAR ASSOCIATION OF SAN FRANCISCO



presents

## Know When to Hold 'Em

An Overview Of Today's Most Relevant Family Law Issues For The Division Of Retirement Assets Including When To Join Plans, Roth 401(k) Plans, Reviewing CPA Reports, And When A QDRO Is Not Required (Rebroadcast)

### Speakers

**Elizabeth Strasen**

Strasen Law

**Jessica Strasen**

Strasen Law

**Celeste Johansson**

Law Offices of Celeste A. Johansson

### Moderator

**Stacey Schliffer**

DeLacey, Riebel & Shindell

This will be a panel discussion with three Bay Area QDRO attorneys discussing how to protect and divide retirement Plan assets, including when and how to prepare and serve Joinders, limitations on their use and alternative procedures. We will discuss current issues with Roth and other post-tax contribution sources in retirement plans, and how to identify and divide them. We will provide tips for checking CPA and other calculations for accuracy before relying on them to form final agreements and cover the importance of addressing gains and losses in written agreements. We will discuss when a QDRO is required and not required, and when the form of order is not called a "QDRO." Our discussion will also include the ever-present possibility of a client death before a retirement division is completed, and ways to avoid malpractice. If time allows, we will also take questions.

### Topics

- The when, why, and how of Joinders: what do they do (and not do) to protect the community's interest
- ROTH and other post-tax components of retirement plans; issues in division
- Tips for checking calculations for accuracy before relying on them to form final agreements
- Gains and losses; how are they calculated? Why does it matter so much?
- When a QDRO is not required; IRAs and important ways in which they are different from 401(k) Plans
- Death and ways to avoid malpractice

### Section Chair

Susanne Stolzenberg, Law Office of Susanne Stolzenberg

Register online: [www.sfbar.org/calendar](http://www.sfbar.org/calendar)

**Wednesday  
June 4, 2025**

MCLE Registration: 11:30 a.m. - 12:00 p.m.  
Virtual Program: 12:00 - 1:30 p.m.

### MCLE: 1 Hour

To receive MCLE credit, you must sign in during the designated MCLE registration period. This activity is approved for Minimum Continuing Legal Education credit by the State Bar of California.

BASF is a certified provider. Provider #103

**Pre-registration is required.**

### Virtual Program

Zoom Link will be provided prior to program.

### Cost

Free for BASF Law Students

\$50 for Section Members

\$60 for BASF Members

\$75 for All Others

*All prices increase \$10 on the day of the program.*

### Viewing Options



Live Webcast available, register at  
[www.sfbar.org](http://www.sfbar.org)



Webcast Recording will be available.  
Register separately on our online platform.

### Special Requests:

People with disabilities should contact BASF regarding reasonable accommodations at [events@sfbar.org](mailto:events@sfbar.org).

**Event Code** G251631