
USING IRA'S TO FUND SNT'S

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INTRODUCTION

- Estate planning for parents of a child with disabilities
- Large IRAs and 401(k)s
- Excellent way to fund SNT for child after parents pass away if done correctly

OUTLINE



OUTLINE

- Basic rules and terms for inherited IRAs
- Family Scenario—issues that arise in leaving an IRA to an SNT
- Stretch IRAs and Designated Beneficiaries

OUTLINE

- Leaving IRAs to a Trust
 - See-Through Trusts
 - Conduit and Accumulations Trusts
 - Special Needs Trusts
 - Income Taxation of IRA Trusts

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Title search: Using IRAs to Fund SNTs

Also available as part of the eCourse

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"IRAs and SNTs"