IRAs in Estate Planning, or Trust me, I’m an EDB for RMDs after the RBD

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LET ME EXPLAIN

No, there is too much. Let me sum up.

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New Required Beginning Date:

Age 75

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IF Beneficiary is a PODB…

AND Participant Died BEFORE the Required Beginning Date…

- PODB can defer all withdrawals until 10th year after participant died
- Entire balance of IRA must be withdrawn in 10 years

AND Participant Died AFTER the Required Beginning Date…

- PODB must take annual withdrawals (based on somebody's life expectancy) during the 10 years
- Entire balance of IRA must be withdrawn in 10 years

Title search: IRAs In Estate Planning, or Trust Me, I'm an EDB for RMDs After the RBD

Also available as part of the eCourse
IRAs in Estate Planning: What You Need to Know

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