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Join us for the next course in the series:

IRAs and Retirement Accounts for Life-changing Events: Marriage, Divorce, Retirement and Death

Broadcast Date

Broadcast Time

Broadcast Location

Webinar Dates: June 5, June 13

Tax practitioners are often challenged when trying to determine which rules apply to IRAs owned by clients who get married, get divorced, retire, attain age 70½ or die. This program summarizes and explains those rules so tax practitioners can understand which IRA rules apply to these life-changing events. Panelists will present the topics simply and provide practical solutions that tax professionals can use in their practices.

Key Topics

- When an IRA owner can take a distribution without an early distribution penalty – highlighting IRA vs. 401(k) exceptions
- The proper way to split IRAs as part of a divorce settlement
- How to preserve the tax-deferred status of inherited IRAs
- The importance of a designated beneficiary
- Tax-efficient required minimum distribution strategies
- Choosing the right distribution options for a spouse beneficiary

Panelists

Denise Appleby, CISP, CRC, CRPS, CRSP, APA
Heather Schreiber, RICP
Michael J. Tucker, CPA, LL.M. (moderator)
Panelists are subject to change.

Details

Course Level: Basic

CPE and IRS Credits: Three hours

IRS Credit Category: Federal tax law

CLE Credits: Approval and credits vary by state; visit **www.allstartax.com** for your state's details.
This course is not approved for CLE in New Mexico.

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