Inheriting an IRA or Employer-Sponsored Retirement Plan

Description: Gain a thorough understanding of IRAs and inherited IRAs and advise your clients with confidence.

This information is specially designed for those who advise their clients on inherited IRA and qualified plan distributions. This topic will also focus on the required minimum distribution rules and how an IRA payable to a trust may still qualify as a designated beneficiary. This information can help you spot and avoid some of the common mistakes taxpayers make with their inherited IRAs.

Learning Objectives:

- You will be able to discuss post-mortem required minimum distributions.
- You will be able to identify common mistakes with inherited IRAs.
- You will be able to review requirements to qualify as designated beneficiary.
- You will be able to identify the rollover rules that apply to IRA and qualified plan beneficiaries.

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- Foundation Concepts
- Required Minimum Distributions
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- Post-Mortem
- Determining the Designated Beneficiary

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- Nonspouse Beneficiaries
- Mistakes With Inherited IRAs

IRAs Payable to Trusts
- Qualifications for a Designated Beneficiary
- Planning for Contingencies: Contingent Trust Beneficiaries
- Separate Share Rule for Determining Required Minimum Distributions

Other IRA Planning Issues
- Inherited IRAs in Bankruptcy
- Nonspouse Rollovers of Plans or IRAs Preparing for Audit


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