

The Bristol County Estate Planning Council

Invites You to Their April Dinner Meeting

Distribution Planning for Inherited IRAs and Inherited Roth IRAs

Elder Law attorneys generally have a unique



Presented by

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JD, CLU, ChFC

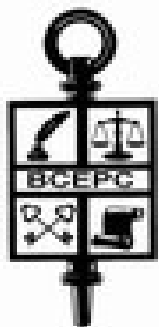
Brokers' Service Marketing Group



Join your fellow financial and estate planning professionals!

The program will present tax issues and planning opportunities for the distribution of large balance IRAs. This will include dealing with multiple IRA accounts including mutual fund IRAs, deferred annuity IRAs, and single premium immediate annuity (SPIA) IRAs. The program will examine 5 situations where life insurance can protect and enhance the IRA value that will be inherited by the heirs of the IRA owner by using after-tax required minimum distributions (RMDs) to fund annual premiums. Finally, examples of hypothetical projections of an "inherited IRA" and an "inherited Roth IRA" will be presented

Must RSVP to:
<http://www.bcepc.net/events/event/12569>



**Bristol
County
Estate Planning
Council**



75 Grand Army Hwy
Swansea. MA



April 14, 2016

5 – 8 pm

Dinner

Member \$30/ Non Member \$40