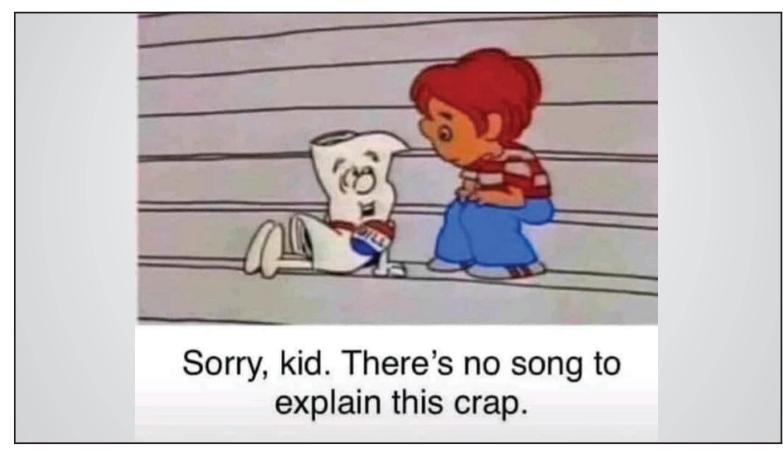
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LET ME EXPLAIN



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

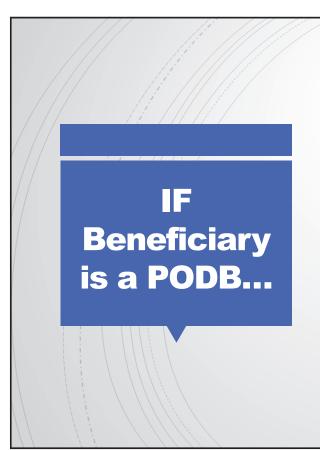
New Required Beginning Date:

Age 75

3

How I feel when I have to scroll down to the year I was born:





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- Entire balance of IRA must be withdrawn in 10 years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- Entire balance of IRA must be withdrawn in 10 years

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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 2023 Estate Planning, Guardianship and Elder Law eConference

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