

Inheriting an IRA was inspired by everyday questions that Mike Jones, CPA, addresses about this crucial topic. Those questions come from IRA inheritors as well as from professionals in the fields of accounting, law, investment management, and philanthropy. It is written for IRA inheritors and their advisors to use together, because Mr. Jones has found that an informed IRA inheritor working together with a knowledgeable advisor consistently produces the best results. You won't have to become an expert in order to handle your Inherited IRA the right way. This book will quickly direct you to the information and tips that you'll need. Advance praise for Inheriting an IRA! If you have inherited an IRA or expect to, read this book before you touch that account. Mike Jones will save you a lot of money and headaches! - Natalie B. Choate, Esq., author of Life and Death Planning for Retirement Benefits Inheriting an IRA is the perfect resource for IRA inheritors and their advisors to use together for understanding and creating Inherited IRA success. - Robert S. Keebler, CPA, MST, AEP (Distinguished) More than 15% of US wealth is held in the form of IRAs. Michael Jones, a nationally known tax expert, provides sophisticated, yet practical and understandable guidance all heirs must have to protect themselves and maximize the economic benefits from this valuable inherited asset. While most guides focus on those setting up IRAs, this book hones in on what those inheriting these assets must know. - Martin M. Shenkman CPA, MBA, PFS, AEP (Distinguished), JD The ultimate value of an inherited IRA often depends on how well informed the beneficiary is. The more they know, the longer the inheritance will last. But the sad truth is that most beneficiaries are ill-prepared to inherit an IRA and are left with a mere fraction of what could have been. Anyone who wishes to leave an IRA or Roth IRA to loved ones must have Inheriting an IRA, by IRA maven Mike Jones, an expert among experts. Nothing is left to chance here. The advice, explanations and warnings in this book are worth a fortune to IRA owners, beneficiaries and professional advisors. Every inherited IRA should come with this essential and detailed guide on navigating the complex web of tax rules surrounding inherited IRAs. Don't leave an IRA without it! - Ed Slott, CPA (www.ira-help.com)

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Explore your options, compare inherited IRA to a beneficiary IRA, and navigate other rules. Overview · Retirement Income Approaches · Create Your Paycheck As a beneficiary, you can't make additional contributions, but with an Inherited each year, you can continue to grow the financial life of your Inherited IRA, and . The IRS lists three options for spouses who inherit a traditional IRA. savings is to transfer the assets to an existing Roth or to open a new Roth IRA. If you're interested in stretching out the lifespan of the IRA, you'd use. 24 Aug - 21

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