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Estate Planning

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WHAT IS THE SECURE ACT 10 YEAR RULE?

- 1- Large IRA/401(k)/403(b)
- 2- Pre-2020 spouse lifetime stretch, children lifetime stretch
- 3- 2020 SECURE spouse lifetime stretch, children 10-year stretch
- 4- Spread over 10 years to minimize income tax hit
- 5- Income levels of spouse/kids

To learn more or schedule a free consultation, click here to get started today:

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