

IRAs, 401(k)s Other Retirement Plans: Strategies for Taking Your Money Out

Twila Slesnick PhD Enrolled Agent, John C. Suttle Attorney
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Twila Slesnick PhD Enrolled Agent, John C. Suttle Attorney : IRAs, 401(k)s Other Retirement Plans: Strategies for Taking Your Money Out before purchasing it in order to gage whether or not it would be worth my time, and all praised IRAs, 401(k)s Other Retirement Plans: Strategies for Taking Your Money Out:

0 of 0 people found the following review helpful. Two StarsBy CustomerNot a lot of useful information that you dont know already.2 of 2 people found the following review helpful. Disappointed in NoloBy RBMunkinVery disappointed in this book from Nolo, whom I usually trust very well. I waited many months for this new edition to come out, expected it to have "strategies for taking your money out", like the subtitle says. Nope. Like the one other reviewer (as of the time of this writing) says, it explains laws and requirements, but not strategies. I was expected different ways of taking money out to make sure it lasts my lifetime, like the 3% rule, etc. Stuff like that. What a disappointment. Nolo, why the false subtitle? I'll be returning this book.4 of 4 people found the following review helpful. Explains IRA,

401K, etc. laws but not strategies
By Steve
This book really did not help me. The title says "strategies" but they really only cover mandatory rules for withdrawal from various types of retirement savings accounts.

Save your nest egg from the IRS
About to retire? Over 70 and facing mandatory withdrawal rules? Just inherited money from a retirement plan? Whether you have an IRA, Roth IRA, 401(k), Keogh or other retirement plan, this book will help you make sense of the rules for taking your money out. Even more important, it will show you how to avoid the stiff taxes and penalties that lurk in the fine print. It covers: tax strategies before and after retirement required distributions and how much you need to take penalties for taking money out early and how to avoid them how to divide a plan at divorce what happens to your retirement plan after your death different rules for taking money out of an inherited plan
The 13th edition is completely updated with the latest tables and methods for calculating required minimum distributions. It also covers the special tax benefits for conversions to Roth IRAs and explains how to recharacterize converted funds if you change your mind.

Depending on the size of the IRA and the age of the beneficiary, it might be smarter to pay the penalty than to liquidate the account simply to avoid the penalty, says Twila Slesnick, author of *IRAs, 401(k)s Other Retirement Plans*.
Kiplingers Retirement Report "A more impressively clear and comprehensive layman's guide is *IRAs, 401(k)s Other Retirement Plans...*" U.S. News World Report "Few resources are as valuable when it comes to financial planning in later life." The Wall Street Journal "This book belongs on the bookshelf of anyone with a retirement plan. Here's where you'll find the answers." Kiplinger's Personal Finance "Uses everyday language to describe Internal Revenue Service rules for making withdrawals from retirement plans." The Wall Street Journal
About the Author
Twila Slesnick is an Enrolled Agent who specializes in tax and investment planning for retirees and prospective retirees, and does pension plan consulting for individuals and small businesses. She has conducted numerous seminars throughout the U.S. in the areas of retirement and tax planning. Slesnick has been featured on television and radio programs across the country and in publications including Money Magazine, U.S. News World Report, Newsweek and Consumer Reports. She is the author (with John Suttle) of *IRAs, 401(k)s and Other Retirement Plans: Taking Your Money Out (Nolo)*. Slesnick has a bachelor's, master's and Ph.D., all from the University of California, Berkeley.
John Suttle has been practicing law for 18 years. His practice consists of estate and trust planning; probate administration; federal, state and local tax counseling for high net worth individuals and retirement planning under ERISA. Co-author of *IRAs, 401(k)s Other Retirement Plans*, he has served as an expert witness in numerous cases.