

From 401(k)s to stretch IRAs, what the Secure Act means for clients

Dear valued client of SBC,

You may have seen in recent news, the SECURE Act (Setting Every Community Up for Retirement Enhancement Act) was passed into law on Friday, December 20th. These changes take effect on January 1st, 2020.

As your advisor, we are here to provide you with up to date education on topics that impact your life. In response to the recent change in law, we will host an educational session highlighting key changes affecting the clients of SBC.

Highlighted topics will include:

- Changes to the Required Minimum Distribution Age
- Required Minimum Distribution and Charitable Giving Planning
- Tax Planning for Inherited Retirement Accounts
- Annuity Products in Qualified Plans
- Part Time Employees and 401(k) Participation
- 529 Account Eligibility Expansion
- Using Retirement Accounts for Birth and Adoption Expenses

Date: Thursday, January 23rd

There will be two sessions to accommodate more people as our room will seat 20-24 people comfortably.

Time: First Session: 3pm to 4:30pm
Second Session: 6:30pm to 8:00pm

Place: SBC Wealth Management
2920 E. 96th Street, Indianapolis

RSVP: mcreazzo@sbcwealth.com or call 317-848-4744
Please RSVP by January 16th due to limited seating

Guests are welcome to attend!