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The IRA Inheritance Trust®

The IRA Inheritance Trust® us a standalone IRA beneficiary trust strategy that's been approved by the IRS since September 2005; however, The SECURE Act (passed in December 2019) came with a number of changes to the IRA stretchout rules.

The SECURE Act required a number of legal and technical changes to the standalone IRA beneficiary trust concept, but it's still a very viable and helpful retirement planning strategy.

THE IRA INHERITANCE TRUST®
LEGAL DOCUMENT FORM PACKAGE

Our original The IRA Inheritance Trust® has now been appropriately and thoroughly updated - - thanks to hours of in-depth analysis, input, and assistance from nationally renowned attorney, Edwin P. Morrow, III, J.D. Plus, we have now enhanced the forms functionality in Microsoft Word to make this form much easier for you to implement into your practice and draft for clients.

The IRA Inheritance Trust® Legal Document Form Package comes with the complete, modifiable standalone IRA Beneficiary Trust with all of the provisions needed to draft this trust for clients.

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    - Used in client meetings and for laying out planning design decisions for the trust)

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  - Example BDFs & Hold Harmless Language
  - Trust Disclosure
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