

ULTIMATE IRA GUIDE

**A Compilation of Quick
Reference Guides for 2023**

Updated for Proposed RMD Regs and SEPP/72(t) Rules

Updated for SECURE Act 2.0

IRA

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MJ, CISP, CRC, CRPS, CRSP, APA



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Taxpayers should work with competent financial, tax or legal professionals to determine the rules that apply to their financial, retirement, or tax planning profiles/cases.

To make for a more user-friendly flow and comprehension, the material is written as if the reader is the IRA owner.

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She is a contributing author of the following books

- **Roth IRA Answer Book.**
- **Quick Reference to IRAs.**
- **Adviser's Guide to Retirement Plans for Small Businesses**
- **SIMPLE, SEP, and SARSEP Answer Book**

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