**Email Content**

While the SECURE Act 2.0 is generating quite a bit of conversation in retirement planning circles, it has not had near the impact in the life insurance segment that the original SECURE Act did when it was passed back in late 2019. The primary impact of SECURE 1.0 in the life insurance space was the significant change to Stretch IRA rules, making inherited IRAs even more of a tax challenge for beneficiaries.

Of course, that initial tax burden is only made worse by future taxation on the growth of these inherited assets. We’re using a strategy you can put in place well in advance of the inheritance being received that can shield this growth from future taxation.

Drop me a note or give me a call if you want to take a closer look at how we’re designing this strategy with other advisors.