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While 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.

We’ve designed a strategy specifically for G2 that can ease the sting of the tax bill that comes with an inherited IRA

Interested in learning more? Let’s chat!

#lifeinsurance #secureact #inheritedira